

DOCUMENT RESUME

ED 198 317

CE 027 993

TITLE Secretarial Science. Curriculum Guides for Two-Year Postsecondary Programs. Volume II.

INSTITUTION North Carolina State Dept. of Community Colleges, Raleigh.

PUB DATE 79

NOTE 476p.; Not available in paper copy due to small, light print. For related documents see CE 027 988-994.

EDRS PRICE MF01 Plus Postage. PC Not Available from EDRS.

DESCRIPTORS *Business Communication; *Business Education; Business English; Community Colleges; *Competency Based Education; Course Content; Course Descriptions; Course Objectives; Course Organization; Curriculum Guides; *Individual Development; Interpersonal Relationship; Mathematics; *Office Occupations Education; Postsecondary Education; Program Development; *Secretaries; Two Year Colleges

ABSTRACT

The second of three volumes in a postsecondary secretarial science curriculum, this manual contains course syllabi and abstracts of twenty-three courses included in the curriculum. Business and related courses abstracted include Introduction to Business, Business Mathematics, Business Law 1, Economics 1, and Survey of Data Processing Systems. General education courses abstracted include Grammar, Composition, Report Writing, Oral Communication, Business Communication, and Interpersonal Relationships and Communications. Each abstract is comprised of the following parts: course description, course hours per week, quarter hours credit, prerequisites, course content outline, and suggested textbooks. Course syllabi are provided for twelve secretarial science technical courses including Accounting: Office Machines 1, 2, and 3; Office Management; Office Procedures; Personal Development; Principles of Supervision; and Records Management. Each course syllabus is comprised of the following parts: (1) course description: (2) course objectives: (3) major divisions of course content: (4) credits, hours, and prerequisites: (5) evaluation: (6) content outline: and (7) a bibliography. (Volumes 1 and 3 are also available.) (LRA)

* Reproductions supplied by EDRS are the best that can be made *

* from the original document. *

ED198317

SECRETARIAL SCIENCE

Curriculum Guides
For
Two-Year Postsecondary Programs

Winter, 1979

U.S. DEPARTMENT OF HEALTH,
EDUCATION & WELFARE
NATIONAL INSTITUTE OF
EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY.

"PERMISSION TO REPRODUCE THIS
MATERIAL HAS BEEN GRANTED BY

A. J. Bevacqua

TO THE EDUCATIONAL RESOURCES
INFORMATION CENTER (ERIC)."

Coordinated by:

R. Jean Overton
Department of Community Colleges

Technical Assistance by:

Brenda A. Splawn

Printed by:

Program Development Division
Department of Community Colleges
Raleigh, North Carolina

CE 027993

TABLE OF CONTENTS

*BUSINESS AND RELATED COURSE ABSTRACTS

Course No.

Introduction to Business	BUS 101
Business Mathematics	BUS 109
Business Law I	BUS 115
Economics I	ECO 102
Survey of Data Processing Systems	EDP 104

*GENERAL EDUCATION COURSE ABSTRACTS

Grammar	ENG 101
Composition	ENG 102
Report Writing	ENG 103
Oral Communication	ENG 204
Business Communication	ENG 206
Interpersonal Relationships and Communications	SOC 215

*SECRETARIAL SCIENCE TECHNICAL COURSES

Accounting	BUS 120
Machine Dictation and Transcription I, II, III	BUS 211
	BUS 212
	BUS 213
Secretarial/General Office Applications	BUS 215
Office Machines I	BUS 110
Office Machines II	BUS 210
Office Management	BUS 271
Office Procedures (General Office/Secretarial)	BUS 214
Personal Development	PSY 231
Principles of Supervision	BUS 272
Records Management	BUS 112
Shorthand I	BUS 106
Shorthand II	BUS 107
Shorthand III	BUS 108
Shorthand Dictation and Transcription I	BUS 206
Shorthand Dictation and Transcription II	BUS 207
Shorthand Dictation and Transcription III	BUS 208
Terminology and Vocabulary - Business, Legal, Medical	BUS 183
Typewriting I	BUS 102
Typewriting II	BUS 103
Typewriting III	BUS 104
Typewriting IV	BUS 204
Typewriting V	BUS 205
Word Processing	BUS 273

*Each course outline and abstract will begin with page one. Each page will be identified with an Arabic number in lower center and course number in lower right-hand corner.

BUSINESS 101

Introduction to Business*

DESCRIPTION OF COURSE:

A survey of the business world that introduces the student to the history of United States business, organization and administration, production, accounting, statistics, management, marketing, finance and business law.

COURSE HOURS PER WEEK: Class, 3-5; Laboratory, 0-2.

QUARTER HOURS CREDIT: 3-5.

PREREQUISITE: None.

MAJOR DIVISIONS OF COURSE CONTENT:

- I. Background of business
- II. Organization and administration
- III. Production
- IV. Human resources
- V. Information for control and management decision
- VI. Marketing
- VII. Finance
- VIII. Business and society

SUGGESTED TEXTBOOKS:

Glos, Raymond E. and Harold A. Baker. Business: Its Nature and Environment, an Introduction. Cincinnati: South-Western Publishing Co., Current Edition.

Keith, Lyman A. and Carlo E. Gubellini. Introduction to Business Enterprise. New York: McGraw-Hill Book Co., Current Edition.

Kirkpatrick, Charles A. and Frederick A. Russ. Business. Chicago: Science Research Associates, Inc., Current Edition.

*This is an abstract of the Introduction to Business syllabus. For a complete copy of the syllabus, write to Program Development Division, Department of Community Colleges, Education Building, Raleigh, NC, 27611.

SUGGESTED REFERENCES:

Bethel, Lawrence L. and others. Industrial Organization and Management.
New York: McGraw-Hill Book Co., Current Edition.

Broom, Halsey N. Business Policy and Strategic Action: Text, Cases
and Management Game. Englewood Cliffs, New Jersey: Prentice-Hall,
Inc., Current Edition.

Broom, Halsey N. and J. G. Longenecker. Small Business Management.
Cincinnati: South-Western Publishing Co., Current Edition.

Keith, Lyman A. and Carlo E. Gubellini. Study Guide-Workbook for Intro-
duction to Business Enterprise. New York: McGraw-Hill Book Co.,
Current Edition.

Yoder, Dale. Personnel Management and Industrial Relations. Englewood
Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.

BUSINESS 109

Business Mathematics*

DESCRIPTION OF COURSE:

The student will review the fundamentals of arithmetic and apply them to business problems in the processes of trading, operating, ownership, financing, investing, summarizing and analyzing. Topics covered include cash and trade discounts, markup, interest, taxes and pertinent uses of mathematics in business and industry.

COURSE HOURS PER WEEK: Class, 5; Laboratory, 0.

QUARTER HOURS CREDIT: 5.

PREREQUISITE: None.

MAJOR DIVISIONS OF COURSE CONTENT:

- I. Fundamentals of arithmetic
- II. Mathematics of trading
- III. Mathematics of operating
- IV. Mathematics of finance
- V. Mathematics of summary and analysis
- VI. Mathematics of business ownership
- VII. Mathematics of investment

SUGGESTED TEXTBOOKS:

Beighey, Clyde and Gordon C. Borchardt. Mathematics for Business: College Course. New York: McGraw-Hill Book Company, Gregg and Community College Division, Current Edition.

Bush, Grace A. and John E. Young. The Mathematics of Business. Chicago: Science Research Associates, Current Edition.

Diamond, Jay and Gerald Pintel. Basic Business Mathematics. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.

* This is an abstract of the Business Mathematics syllabus. For a complete copy, write to Program Development Division, Department of Community Colleges, Education Building, Raleigh, NC, 27611.

Kaliski, Burton S. Business Mathematics. New York: Harcourt Brace
Jovanovich, Inc., Current Edition.

Rice, Louis A., Alfred C. Boyd and F. Blair Mayne. Business Mathematics
for Colleges. Cincinnati: South-Western Publishing Co., Current
Edition.

BUSINESS 115

Business Law I*

DESCRIPTION OF COURSE:

This course is designed for students who need an understanding of substantive business law. The student will be able to define business law terminology and state involvement of business law in the following areas: nature and sources of our legal system, contracts, sales, commercial papers, bailments and agency.

COURSE HOURS PER WEEK: Class, 3-5; Laboratory, 0.

QUARTER HOURS CREDIT: 3-5.

PREREQUISITE: None.

MAJOR DIVISIONS OF COURSE CONTENT:

- I. Nature and sources of law
- II. Court and court procedure
- III. Nature and types of contracts
- IV. Selling personal property
- V. Negotiable instruments
- VI. Personal property characteristics
- VII. Agencies

SUGGESTED TEXTBOOK:

Anderson, Ronald A. and Walter A. Kumpf. Business Law Uniform Commercial Code. Cincinnati: South-Western Publishing Co., Current Edition.

SUGGESTED REFERENCES:

Charles, A. Aldo. College Law for Business. Cincinnati: South-Western Publishing Co., Current Edition.

Christ, Jay. Fundamentals of Business Law. Englewood Cliffs: Prentice-Hall, Inc., Current Edition.

Corley, Robert N. and Robert L. Black. The Legal Environment of Business. New York: McGraw-Hill Book Co., Current Edition. (Paper-bound)

*This is an abstract of the Business Law I syllabus. For a complete copy, write to Program Development Division, Department of Community Colleges, Education Building, Raleigh, NC, 27611.

Dillavan and Howard. Principles of Business Law. Englewood Cliffs:
Prentice-Hall, Inc., Current Edition.

Fisk, McKee and Mames C. Smapp. Applied Business Law. Cincinnati:
South-Western Publishing Co., Current Edition.

Getz, S. George. Business Law for Everyday Living. Englewood Cliffs:
Prentice-Hall, Inc., Current Edition.

Kratovil, Robert. Real Estate Law. Englewood Cliffs: Prentice-Hall,
Inc., Current Edition.

Lehman, Warren. Practical Law. New York: Doubleday & Company, Inc.,
Current Edition.

Rosenberg, R. Robert and William G. Ott. College Business Law. New
York: McGraw-Hill Book Co., Current Edition.

Unger, Maurice A. Elements of Business Law. Englewood Cliffs: Prentice-
Hall, Inc., Current Edition.

ECONOMICS 102

Economics I* (Introduction to Economics)

DESCRIPTION OF COURSE:

The student will be aware of the economic decisions that are made daily by individuals and groups in society. Emphasis is primarily on general economics for citizenship; and generally on politics, history, sociology, etc. The course provides a foundation for further study in economics but is also designed for the student who may not take another economics course.

COURSE HOURS PER WEEK: Class, 3-5; Laboratory, 0.

QUARTER HOURS CREDIT: 3-5.

PREREQUISITE: None.

MAJOR DIVISIONS OF COURSE CONTENT:

- I. The economic system
- II. The market system
- III. Monetary policy in a market system
- IV. Government finance and fiscal policy
- V. Business cycles and inflation

SUGGESTED TEXTBOOKS:

Bowden, Elbert V. Economics: The Science of Common Sense. Cincinnati: South-Western Publishing Co., Current Edition.

Hailstones, Thomas and Michael Brennan. Economics: An Analysis of Principles and Policies. Cincinnati: South-Western Publishing Co., Current Edition.

McConnell, Campbell R. Economics: Principles, Problems and Policies. New York: McGraw-Hill Book Co., Current Edition.

SUGGESTED REFERENCES:

Daily newspapers
Television programs related to topics discussed
U.S. News and World Report

*This is an abstract of Economics I (Introductory) syllabus. For a complete copy, write to Program Development Division, Department of Community Colleges, Education Building, Raleigh, NC, 27611.

EDP 104

Survey of Data Processing Systems*
(Introduction)

DESCRIPTION OF COURSE:

The student will develop a basic knowledge of the fundamental concepts and operational principles of data processing systems. Topics covered include: history of data processing, operating characteristics of computers, data processing terminology and the role of computers in business and industry. (This course is a prerequisite for all programming courses.)

COURSE HOURS PER WEEK: Class, 2-4; Laboratory, 0-2.

QUARTER HOURS CREDIT: 3-4.

PREREQUISITE: None.

MAJOR DIVISIONS OF COURSE CONTENT:

- I. History of and terminology in data processing
- II. Punched-card systems
- III. Computer systems and concepts
- IV. Flow charting
- V. Programming languages
- VI. Data processing applications

SUGGESTED TEXTBOOKS:

Awad, Elias M. and Data Processing Management Association. Automatic Data Processing: Principles and Procedures. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.

Bohl, Marilyn. Information Processing. Chicago: Science Research Associates, Inc., Current Edition.

Davis, Gordon B. Computer Data Processing. New York: McGraw-Hill Book Co., Current Edition.

Dock, V. Thomas and Edward Essick. Principles of Business Data Processing. Chicago: Science Research Associates, Inc., Current Edition.

*This is an abstract of the Introductory Data Processing syllabus. For a complete copy of the syllabus, write to Program Development Division, Department of Community Colleges, Education Building, Raleigh, NC, 27611.

Feingold, Carl. Introduction to Data Processing. Dubuque, Iowa: Wm. C. Brown Company Publishers, Current Edition.

Kahn, Gilbert. Business Data Processing: Basic Principles and Applications. New York: McGraw-Hill Book Company, Current Edition.

Robichaud, Beryl and others. Introduction to Data Processing. New York: McGraw-Hill Book Company, Current Edition.

Schnake, Marilyn A. Data Processing Concepts. New York: McGraw-Hill Book Company, Current Edition.

Stern, Robert A. and Nancy B. Stern. Principles of Data Processing. New York: John Wiley & Sons, Inc., Current Edition.

Wanous, S. J. and others. Fundamentals of Data Processing. Cincinnati: South-Western Publishing Co., Current Edition.

ENGLISH 101

Grammar*

DESCRIPTION OF COURSE:

Designed to aid the student in the improvement of self-expression through writing. Emphasis is on grammar, diction, sentence structure, punctuation and spelling. It is intended to stimulate students in applying the basic principles of English grammar in their day-to-day situations in industry and social life.

COURSE HOURS PER WEEK: Class, 3; Laboratory, 0.

QUARTER HOURS CREDIT: 3.

PREREQUISITE: None.

MAJOR DIVISIONS OF COURSE CONTENT:

- I. Parts of speech
- II. Correct word choice
- III. Sentence structure
- IV. Punctuation
- V. Paragraphs and topic sentences

SUGGESTED TEXTBOOKS:

Aurner, Robert R. and Paul S. Burtner. Practical English for Colleges. Cincinnati: South-Western Publishing Co., Current Edition.

Graham, Sheila Y. Harbrace College Workbook. Form 7A and 7B. New York: Harcourt Brace Jovanovich, Current Edition.

Hodges, John C. and Mary E. Whitten. Harbrace College Handbook. New York: Harcourt Brace Jovanovich, Current Edition.

Perrin, Porter G. and George H. Smith. Handbooks of Current English. Glenview, Illinois: Scott, Foresman and Company, Current Edition.

*This is an abstract of the English Grammar syllabus. For a complete copy, write to Program Development Division, Department of Community Colleges, Education Building, Raleigh, NC, 27611.

ENGLISH 102

Composition*

DESCRIPTION OF COURSE:

English Composition is designed to aid the student in improvement of self-expression by means of practical application in business and technical writing. Emphasis is on writing sentences, paragraphs and compositions.

COURSE HOURS PER WEEK: Class, 3; Laboratory, 0.

QUARTER HOURS CREDIT: 3.

PREREQUISITE: ENG 101, Grammar.

MAJOR DIVISIONS OF COURSE CONTENT:

- I. Using words
- II. Types of sentences
- III. Writing sentences
- IV. Writing paragraphs
- V. Types of writing
- VI. Organizing and writing papers
- VII. Reading, writing and learning exposition

SUGGESTED TEXTBOOKS:

Decker, Randall E. Patterns of Exposition. Boston: Little, Brown and Company, Current Edition.

Hall, Donald. Writing Well. Boston: Little, Brown and Company, Current Edition.

Martin, Elizabeth K. and C. Jeriel Howard. Technique: Studies in Composition. San Francisco: Canfield Press, Current Edition.

* This is an abstract of the English Composition syllabus. For a complete copy, write to Program Development Division, Department of Community Colleges, Education Building, Raleigh, NC, 27611.

ENGLISH 103

Report Writing*

DESCRIPTION OF COURSE:

The fundamentals of English are utilized as a background for the organization and techniques of modern report writing. Exercises in developing typical reports, using writing techniques and graphic devices are completed by the students. Practical application in the preparation of a full-length report is required of each student at the end of the term. The report must relate to the student's specific curriculum.

COURSE HOURS PER WEEK: Class, 3; Laboratory, 0.

QUARTER HOURS CREDIT: 3.

PREREQUISITE: ENG 102, Composition.

MAJOR DIVISIONS OF COURSE CONTENT:

- I. Purpose of report writing
- II. Types of reports
- III. Composition of reports
- IV. Organizing and writing reports
- V. Editing and proofreading reports
- VI. Abstracting reports

SUGGESTED TEXTBOOKS:

Brown, Leland. Effective Business Report Writing. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.

Harwell, George C. Technical Communications. New York: Macmillan Company, Inc., Current Edition.

Sherman, Theodore A. Modern Technical Writing. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.

*This is an abstract of the Report Writing syllabus. For a complete copy, write to Program Development Division, Department of Community Colleges Education Building, Raleigh, NC, 27611.

1
Sklare, Arnold B. The Technician Writes: A Guide to Basic Technical Writing. San Francisco: Boyd and Fraser Publishing Co., Current Edition.

Ulman, Joseph N., Jr. and Gould, Jay R. Technical Reporting. Holt, Rinehart and Winston, Inc., Current Edition.

ENGLISH 204

Oral Communication*

DESCRIPTION OF COURSE:

The principles, techniques and practical applications of communicating the thoughts and personality through the voice and visible action of the individual to one or more persons for the purpose of achieving a previously determined response. Areas covered vary according to class needs, but, in general, include: basic concepts, nonverbal and verbal language, vocal usage, speech preparation (analyzing audience and occasion, determining purpose, selecting and narrowing subject, gathering and organizing material, wording and practicing aloud) and effective listening.

COURSE HOURS PER WEEK: Class, 3; Laboratory, 0.

QUARTER HOURS CREDIT: 3.

PREREQUISITE: None.

MAJOR DIVISIONS OF COURSE CONTENT:

- I. Basic concepts of communication
- II. Using the body to communicate
- III. Using the voice to communicate
- IV. Preparing the speech
- V. Effective listening

SUGGESTED TEXTBOOKS:

Hasling, John. The Message, the Speaker, the Audience. New York: McGraw-Hill Book Co., Current Edition.

Monroe, Alan H. Principles of Speech Communication. Glenview, Illinois: Scott, Foresman and Co., Current Edition.

Ross, S. Raymond. Speech Communication: Fundamentals and Practice. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.

*This is an abstract of the Oral Communication syllabus. For a complete copy, write to Program Development Division, Department of Community Colleges, Education Building, Raleigh, NC; 27611

ENGLISH 206

Business Communication*

DESCRIPTION OF COURSE:

The course is designed to develop skill in writing business communication. Emphasis is placed on the types of business communication - response and reply letters, sales letters, credit letters, application letters, inter-office memorandums, minutes of meetings, etc. - used in business and industry.

COURSE HOURS PER WEEK: Class, 3; Laboratory, 0.

QUARTER HOURS CREDIT: 3.

PREREQUISITES: ENG 101, Grammar; ENG 102, Composition.

MAJOR DIVISIONS OF COURSE CONTENT:

- I. Review of the problems in communication
- II. Grammar review
- III. Study of the basic principles of writing, letter formats and mechanics
- IV. Identification of types of letters and other forms of correspondence used in business and industry.
- V. Business report writing
- VI. Dictation unit
- VII. Emphasis on problem-solving approach in developing personal writing style

SUGGESTED TEXTBOOKS:

Aurner, Robert R. and Morris P. Wolf. Effective Communication in Business. Cincinnati: South-Western Publishing Co., Current Edition.

Fruehling, Rosemary T. and Sharon Bouchard. Business Correspondence. New York: McGraw-Hill Book Co., Current Edition.

Garrett, Eleanor W. Self-Instructional Course in Business Communications. Author's address: Route 1, Box 217, Midland, North Carolina, 28107.

*This is an abstract of the Business Communication syllabus. For a complete copy, write to Program Development Division, Department of Community Colleges, Education Building, Raleigh, NC, 27611.

Robertson, Mary and Charles F. Walker. Practical Business Correspondence for Colleges. Cincinnati: South-Western Publishing Co., Current Edition.

Shurter, Robert L. Written Communication in Business. New York: McGraw-Hill Book Co., Current Edition.

SUGGESTED REFERENCES:

Gavin, Ruth E. and William A. Sabin. Reference Manual for Stenographers and Typists. New York: Gregg Division, McGraw-Hill Book Co., Current Edition.

Hodges, John C. and Mary E. Whitten. Harbrace College Handbook. New York: Harcourt Brace Jovanovich, Inc., Current Edition.

Webster's Seventh New Collegiate Dictionary. Springfield, Massachusetts: G. & C. Merriam Co., Publishers, Current Edition.

SOCIOLOGY 215

Interpersonal Relationships and Communications*

DESCRIPTION OF COURSE:

A basic course dealing with interpersonal and communication skills utilized in helping relationships. Examination is made of barriers which prohibit communication and hamper the helping process. The student will learn techniques of interviewing for specific purposes and acquire basic abilities in working with people.

COURSE HOURS PER WEEK: Class, 3; Laboratory, 0.

QUARTER HOURS CREDIT: 3.

PREREQUISITE: None.

MAJOR DIVISIONS OF COURSE CONTENT:

- I. Communication
- II. Overcoming barriers to communication
- III. Interviewing
- IV. Worker's activities in interviewing
- V. Practices, principles and concepts used in interviewing
- VI. Written communication

SUGGESTED TEXTBOOKS:

Johnson, David W. Reaching Out: Interpersonal Effectiveness and Self-Actualization. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.

SUGGESTED REFERENCES:

Lindgren, Henry Clay and Leonard W. Fisk, Jr. Psychology of Personal Development. New York: John Wiley & Sons, Inc., Current Edition.

*This is an abstract of Interpersonal Relationships and Communications syllabus. For a complete copy, write to Program Development Division, Department of Community Colleges, Education Building, Raleigh, NC, 27611.

SYLLABUS FOR
ACCOUNTING I
(Introductory)
BUSINESS 120

This syllabus was developed by Joyce Cherry and Edith Dail, Lenoir Community College. The syllabus was reviewed and revised by Carolyn Hawkins, East Henderson High School; Ralph Rice, Mayland Technical Institute and Freda Bullard, Southeastern Community College for use in the secretarial science program. The syllabus was reviewed by the Secretarial Science Advisory Committee.

Appreciation is expressed to each individual contributor, their respective institutions and the Advisory Committee for their assistance and cooperation.

A content outline developed by Richard Jarvies, Accounting Department Head, Fayetteville Technical Institute is included in the Appendix.

BUSINESS 120 ACCOUNTING I (Secretarial Science)

I. DESCRIPTION OF COURSE:

The student will apply the basic functions, techniques, principles and concepts of accounting. Emphasis is on business transactions and their effect on the accounting equation; debits and credits in double-entry accounting; selecting and recording financial data in journals and ledgers; preparing work sheets; balance sheets and income statements and introduction to the basic concepts of internal control.

II. COURSE OBJECTIVES:

Given the materials as presented in this course, the student will be able to:

1. Recognize business transactions.
2. Demonstrate the effect of business transactions on the accounting equations.
3. Employ debits and credits in double-entry accounting.
4. Select various journals for recording financial data.
5. Select various ledgers for recording financial data.
6. Analyze financial data for end-of-the-year adjustments.
7. Assemble financial data for financial statements.
8. Calculate interest.
9. Estimate and record data for uncollectible accounts.
10. Calculate inventories.
11. Record deferred and accrued adjustments.
12. Work with plant assets.
13. Compute and record payroll.
14. Handle cash and non-cash items.

III. COURSE OVERVIEW:

- A. Debits and credits
- B. Journals and ledgers
- C. End-of-period work (internally)
- D. Financial statements
- E. Accounting for cash and non-cash items
- F. Payroll
- G. Receivables and payables
- H. Inventories
- I. Deferrals and accruals
- J. Plant assets and intangible assets
- K. Practice set

IV. CREDITS, HOURS, PREREQUISITES:

- A. Four - six (4 - 6) quarter hours credit
- B. Three - five (3 - 5) lecture hours per week
- C. Two (2) laboratory hours per week
- D. Prerequisite: None (Course may be taught for two quarters.)

V. EVALUATION:

There are eleven units in this course. Three tests are given for each unit - a pretest, a test, and a retest. Only the highest score of the test or the retest is recorded. A comprehensive final examination is given. The lowest unit test grade will be dropped; the final examination grade cannot be dropped. The unit test grades and final examination constitutes 60% of the final grade. There will be a test on the practice set. This test counts 60%; the practice set itself counts 40% - this test and practice set constitute 40% of the final grade.

Practice set test	60%	
Practice set	40%	Counts 40% of final grade.
	<u>100%</u>	

Unit tests	Test	%	
Final examination	Exam	%	Counts 60% of final grade.
	<u>Average</u>	<u>%</u>	

COMPETENCIES FOR ACCOUNTING I
(Secretarial Science)

The student will have knowledge of or understanding that:

The accounting equation and accounts and their relationship to debits and credits.

The purpose for a work sheet.

The types of various journals and ledgers used in business and industry.

The work necessary to close a simple set of books.

The essential financial statements needed in business and industry.

The handling of and accounting for cash receipts and disbursements, including various considerations involved in keeping cash and non-cash items in a commercial bank.

The controls in a system that are established to insure accurate accounting for cash.

The procedures for control over non-cash items.

The types of remuneration in payrolls and payroll algorithms.

The use of payroll records.

The use of flowcharts in a payroll system.

How to recognize a promissory note.

The flow of costs using first in, first out method (FIFO).

The flow of costs using last in, first out method (LIFO).

The flow of costs using weighted average.

The distinction between periodic and perpetual inventory methods.

The estimated cost figure for merchandise inventory using the retail method.

The estimated cost figure for merchandise inventory using the gross profit method.

The distinction between deferrals and accruals.

The position of deferrals and accruals on the balance sheet.

The deferrals and accruals requiring reversing entries.

The initial costs of plant assets.

The position of depreciation on the income statement and the balance sheet.
How to recognize an intangible asset and record its related amortization.

The student will be skilled in:

Classifying accounts according to the elements in the accounting equation.

Debiting and crediting accounts to show increases and decreases in the accounting equation.

Using general ledgers and general journals.

Using special ledgers and special journals.

Correlating transactions between general and special ledgers and general and special journals.

Determining the equality of debits and credits in a ledger using the trial balance.

Making adjusting entries and balancing to correct figures.

Making closing entries and summarizing into one account.

Completing a worksheet.

Making reversing entries.

Preparing an income statement.

Preparing a capital statement or retained earnings statement, whichever is applicable.

Preparing a balance sheet.

Accurately preparing payroll records.

Computing wages.

Computing net pay.

Computing employer's payroll taxes.

Computing interest on a promissory note using the 60-day, 6% method.

Recording appropriate transactions for interest-bearing and discounted notes payable and notes receivable.

Recording the estimated adjusting figures for the allowance account for accounts receivable.

Writing-off uncollectible accounts.

Recording adjustments for deferred expenses.
Recording adjustments for deferred income.
Recording adjustments for accrued expenses.
Recording adjustments for accrued income.
Computing and recording related depreciation.
Recording the disposal or sale of plant assets.
Recording the amortization of an intangible asset.

The student will have the attitude:

That the accounting equation has an important effect on business transactions.

That much work is necessary to close a simple set of books.

That accurate financial statements are essential in the operation of a business.

That accurately accounting for cash and non-cash items is essential to the operation of a business.

That accounting procedures for notes, accounts receivable and accounts payable and their related activities are essential to the operation of a business.

That various methods of computing flow of costs in and estimating costs for merchandise inventory is important.

That it is important to determine correctly the cost value of merchandise inventory.

That funding essential information through an accounting system is important to the operation of a business.

ACCOUNTING I
(Introductory)

Unit I. Debits and Credits

Principal Objective: To instill in the student an understanding of the accounting equation and accounts and their relationship to debits and credits.

Competency

Content Outline

A. To be able to explain elements of accounting equation

B. To be able to classify accounts according to the elements in the accounting equation

C. To be able to debit and credit accounts to show increases and decreases in the accounting equation

A. Development of accounting equation

1. Definition of elementary elements in equation
 $\text{Assets} = \text{Equity}$
2. Break-down of equity
 $\text{Assets} = \text{Creditor's Equity} + \text{Owner's Equity}$
3. Other names for creditor's equity and owner's equity
 $\text{Assets} = \text{Liabilities} + \text{Capital}$
4. Break-down of capital
Investment, Drawing, Revenue, and Expenses

B. Classify accounts as to

1. Current assets
2. Plant assets
3. Current liability
4. Long-term liability
5. Capital
6. Revenue
7. Expenses

C. Debit and credit accounts to indicate increases and decreases

1. Debits and credits accounting method of adding and subtracting
2. Debit assets, drawing, and expenses to increase
3. Credit liabilities, capital, and revenue to increase
4. Relationship of debits and credits to normal balances in accounts

Activity Experience**Evaluation**

A. Lecture/demonstration
Instant Response*

A. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made

B. Lecture/demonstration,
transparencies, instant
response

B. Have students demonstrate by instant response a knowledge of classification

C. Lecture/demonstration,
transparencies, instant
response

C. Have students complete with a minimum of 70% accuracy a multiple-choice, fill-in-the-blank, and problem-solving test. To achieve 70% accuracy, the student will complete a pre-test, test, and retest on the unit. Only the higher of the test or retest grade will be recorded

*Instant Response - The teacher asks a question and all students are required to write the answer. A student is asked the answer and all students are asked if they showed correct answer. The key to this is that students are required to write the answers.

Unit II. Journals and Ledgers

Principal Objective: To acquaint the student with a working knowledge of the various journals and ledgers used in businesses.

Competency

Content Outline

A. To be able to use general ledgers and general journals

- A. When and how to use general journals and general ledgers
1. When to use the general journal and the general ledger
 2. Debit and credit positions in general journal
 3. Format of the general ledger and account numbers
 4. Posting procedure

B. To be able to use special ledgers and special journals

- B. Why, when, and how to use special journals and special ledgers
1. Why businesses use special journals and special ledgers
 2. When to use special journals and special ledgers
 3. Format of special journals and special ledgers
 4. Correlation of special journals and control accounts
 5. Posting procedure

C. To be able to correlate transactions between A and B

- C. Correlation of transactions in general journals and special journals to general ledgers and special ledgers
1. Posting procedure from general journals
 2. Posting procedure from special journals

Activity Experience**Evaluation**

A. Lecture/demonstration, transparencies, problem-solving

A. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made

B. Lecture/demonstration, transparencies, problem-solving

B. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made

C. Lecture/demonstration, transparencies, problem-solving

C. Have students complete with a minimum of 70% accuracy a multiple-choice, fill-in-the-blank, and problem-solving test. To achieve 70% accuracy, the student will complete a pre-test, test, and retest on the unit. Only the higher of the test or retest grades will be recorded

Unit III. End-of-Period Work (Internally)

Principal Objective: To develop in the student an understanding of the work necessary to close a simple set of books.

Competency

Content Outline

- | | |
|--|--|
| A. To be able to determine the equality of debits and credits in a ledger through the use of the trial balance | A. Source and purpose of trial balance figures <ol style="list-style-type: none">1. Source of trial balance figures2. Purpose of trial balance figures |
| B. To be able to take affected accounts and adjust their balances to the proper figures | B. Purpose and procedure of making adjusting entries <ol style="list-style-type: none">1. Why adjusting entries are made2. Three types of adjusting entries - prepared expenses, plant assets, and accrued liabilities3. Procedure for making adjusting entries |
| C. To be able to take affected accounts and summarize them in one account | C. Purpose and procedure of making closing entries <ol style="list-style-type: none">1. Why closing entries are made2. Types of accounts affected by closing entries3. Procedure for making closing entries |
| D. To be able to understand the purpose for and to complete a work sheet | D. Purpose and procedure of completing a work sheet <ol style="list-style-type: none">1. Benefits of a work sheet2. Source of account names and figures on work sheet3. Coding system for adjustments4. Extension of figures to Income Statement and Balance Sheet columns5. Rulings |
| E. To be able to take affected accounts and return them to proper working order | E. Reversing entries <ol style="list-style-type: none">1. Purpose of reversing entries2. Procedure for making reversing entries |

Activity Experience**Evaluation**

A. Lecture/demonstration, transparencies, problem solving

B. Lecture/demonstration, transparencies, problem solving

C. Lecture/demonstration, transparencies, problem solving

D. Lecture/demonstration, transparencies, problem solving

E. Lecture/demonstration, transparencies, problem solving

A. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made

B. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made

C. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made

D. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made

E. Have students complete with a minimum of 70% accuracy a multiple-choice, fill-in-the-blank, and problem-solving test. To achieve 70% accuracy, the student will complete a pre-test, test, and retest on the unit. Only the higher of the test or retest grades will be recorded

Unit IV. Financial Statements

Principal Objective: To acquaint the student with a working knowledge of essential financial statements.

Competency

Content Outline

A. To be able to complete an income statement

A. Purpose of and procedure for an income statement

1. Definition of an income statement
2. Accounts and balances shown on an income statement
3. Order of accounts shown on income statement
4. Rulings
5. Information to be found on income statement

B. To be able to complete a capital statement or a retained earnings statement, whichever is applicable

B. Purpose of and procedure for a capital or retained earnings statement

1. Applicability of capital or retained earnings statement
2. Definition of capital or retained statement
3. Form of capital or retained statement
4. Information to be found on capital or retained earnings statement

C. To be able to complete a balance sheet

C. Purpose of and procedure for a balance sheet

1. Definition of balance sheet
2. Accounts and balances shown on balance sheet
3. Classification of accounts on balance sheet
4. Order of classifications on balance sheet
5. Rulings
6. Information to be found on balance sheet

Activity Experience**Evaluation**

A. Lecture/demonstration,
transparencies, instant
response, problem solving

A. Have students complete with 100% accuracy
textbook questions, exercises, and prob-
lems. This work is checked by the student
and necessary corrections can be made

B. Lecture/demonstration,
transparencies, instant
response, problem solving

B. Have students complete with 100% accuracy
textbook questions, exercises, and prob-
lems. This work is checked by the student
and necessary corrections can be made

C. Lecture/demonstration,
transparencies, instant
response, problem solving

C. Have students complete with a minimum of
70% accuracy a multiple-choice, fill-in-
the-blank, and problem-solving test. To
achieve 70% accuracy, the student will
complete a pre-test, test, and retest on
the unit. Only the higher of the test or
retest grade will be recorded

Unit V. Accounting for Cash and Non-Cash Items

Principal Objective: The student will understand the handling of and accounting for cash receipts and disbursements, including various considerations that are involved when cash is kept in a commercial bank; also other non-cash items.

Competency

Content Outline

A. To recognize the controls in a system that are established to insure accurate accounting for cash

B. To be able to outline procedures for control over non-cash items

A. Control over cash

1. Bank account
2. Bank statement
 - a. Reconciliation
 - b. Journal entries
3. Cash receipts
4. Cash payments
 - a. Voucher system
 - b. Non-voucher system
5. Purchase discounts
6. Petty cash

B. Control over non-cash items

1. Note register
2. Insurance register
3. Balance sheet items
4. Income statement items

Activity Experience**Content Outline**

A. Lecture/demonstration; show
ALEX unit, transparencies

A. Student will respond orally to questions
asked

Have students complete with 100% accuracy
textbook questions, exercises, and prob-
lems. This work is checked by the student
and necessary corrections can be made

B. Lecture; demonstrate; show
transparencies

B. Have students complete with a minimum of
70% accuracy a multiple-choice, fill-in-
the-blank, and problem-solving test. To
achieve 70% accuracy, the student will
complete a pre-test, test, and retest on
the unit. Only the higher of the test or
retest grade will be recorded

Unit VI. Payroll

Principal Objective: To enable the student to accurately prepare payroll records.

Competency

Content Outline

- | | |
|--|--|
| A. To enable student to identify types of remuneration | A. Remuneration <ol style="list-style-type: none">1. Salaries2. Wages3. Commissions4. Incentive |
| B. To enable student to compute wages | B. Computing wages <ol style="list-style-type: none">1. Time tickets2. Clock cards |
| C. To demonstrate a knowledge of payroll algorithms | C. Algorithms |
| D. To enable student to compute net pay | D. Net pay <ol style="list-style-type: none">1. Gross pay2. Deductions |
| E. To be able to use payroll records | E. Payroll records <ol style="list-style-type: none">1. Federal forms2. Payroll register3. Employee's earning record |
| F. To be able to demonstrate, through use of a flowchart, the payroll system | F. The flowchart |
| G. To identify and compute employer's payroll taxes | G. Employer's payroll taxes <ol style="list-style-type: none">1. Recording2. Paying3. Accruing |

Activity Experience	Evaluation
A. Lecture; local business illustrations; transparencies	A. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made
B. Lecture/demonstration	B. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made
C. Lecture/demonstration	C. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made
D. Lecture; tax forms	D. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made
E. Lecture; forms; transparencies	E. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made
F. Lecture; transparencies	F. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made
G. Lecture/demonstration; transparencies	G. Have students complete with a minimum of 70% accuracy a multiple-choice, fill-in-the-blank, and problem-solving test. To achieve 70% accuracy, the student will complete a pre-test, a test, and a retest on the unit. Only the higher of the test or retest grade will be recorded

Unit VII. Receivables and Payables

Principal Objective: To create in the student an understanding of accounting procedures for notes and accounts receivable and payable, and their related activities.

Competency

Content Outline

- | | |
|--|--|
| <p>A. To be able to recognize a promissory note</p> <p>B. To be able to compute interest on a promissory note using the 60-day, 6% method</p> <p>C. To be able to record appropriate transactions for interest-bearing and discounted notes receivable</p> | <p>A. Elements of a promissory note</p> <ol style="list-style-type: none">1. Legality2. Maker3. Payee4. Sum of money to be paid5. Length of time in which or on which to pay <p>B. Computation of interest using the 60-day, 6% method</p> <ol style="list-style-type: none">1. Compute interest for 60 days at 6%2. Compute interest for more than or less than 60 days at 6%3. Compute interest for more than or less than 60 days at more than or less than 6% <p>C. Interest-bearing and discounted notes receivable</p> <ol style="list-style-type: none">1. Differentiate between interest-bearing and discounted notes2. Define discount3. Record transactions when interest-bearing note is received4. Record transactions when interest-bearing note receivable is paid5. Record transactions when discounted note is received6. Record transactions when discounted note is paid7. Compute proceeds when a note receivable is discounted8. Record receipt of proceeds |
|--|--|

Activity Experience**Evaluation**

A. Lecture/demonstration,
transparencies

A. Have students complete with 100% accuracy
textbook questions, exercises, and prob-
lems. This work is checked by the student
and necessary corrections can be made

B. Lecture/demonstration,
transparencies, problem
solving

B. Have students complete with 100% accuracy
textbook questions, exercises, and prob-
lems. This work is checked by the student
and necessary corrections can be made

C. Lecture/demonstration,
transparencies, problem
solving

C. Have students complete with 100% accuracy
textbook questions, exercises, and prob-
lems. This work is checked by the student
and necessary corrections can be made

Competency

Content Outline

D. To be able to record appropriate transaction for interest-bearing and discounted notes payable

E. To be able to record the estimated adjusting figure for the allowance account for accounts receivable

F. To be able to write-off uncollectible accounts

D. Interest-bearing and discounted notes payable

1. Record transaction when interest-bearing note is issued
2. Record transaction when interest-bearing note is paid
3. Record transaction when discounted note is issued
4. Record transaction when discounted note is paid

E. Estimating and recording adjusting figures for allowance account

1. Figure based on net sales
2. Record transaction for adjusting figure
3. Figure based on analysis of accounts receivable
4. Record transaction for adjusting figure

F. Write-off of uncollectible accounts receivable

1. Record transaction using direct write-off method
2. Record transaction to reinstate and record payment when partial or complete payment is made
3. Record transaction using allowance method
4. Record transaction to reinstate and record payment when partial or complete payment is made

Activity Experience**Evaluation**

D. Lecture/demonstration,
transparencies, problem
solving

D. Have students complete with 100% accuracy
textbook questions, exercises, and prob-
lems. This work is checked by the student
and necessary corrections can be made

E. Lecture/demonstration,
transparencies, problem
solving

E. Have students complete with 100% accuracy
textbook questions, exercises, and prob-
lems. This work is checked by the student
and necessary corrections can be made

F. Lecture/demonstration,
transparencies, problem
solving

F. Have students complete with a minimum of
70% accuracy a multiple-choice, fill-in-
the-blank, and problem-solving test. To
achieve 70% accuracy, the student will
complete a pre-test, test, and retest on
the unit. Only the higher of the test or
retest grade will be recorded

Unit VIII. Inventories

Principal Objective: To acquaint the student with various methods of computing flow of costs in and estimating costs for merchandise inventory.

Competency

Content Outline

- | | |
|--|---|
| A. To be able to explain the importance of determining correctly the cost value of merchandise inventory | A. Importance of correct figure to net income <ol style="list-style-type: none">1. Net income if figure is underestimated2. Net income if figure is overestimated |
| B. To be able to determine the flow of costs using FIFO | B. FIFO method <ol style="list-style-type: none">1. Cost charged against revenue in the order in which the costs occur2. Compute inventory |
| C. To be able to determine the flow of costs using LIFO | C. LIFO method <ol style="list-style-type: none">1. Most recent costs charged against revenue2. Compute inventory |
| D. To be able to determine the flow of costs using weighted average | D. Weighted average <ol style="list-style-type: none">1. Average of costs charged against revenue2. Compute costs |
| E. To be able to distinguish between periodic and perpetual inventory methods | E. Periodic and perpetual inventories <ol style="list-style-type: none">1. Define periodic inventory2. Define perpetual inventory3. Record transactions when perpetual inventories are used |
| F. To be able to estimate the cost figure for merchandise inventory using the retail method | F. Retail method <ol style="list-style-type: none">1. Reason(s) for using retail method2. Compute estimated cost |
| G. To be able to estimate the cost figure for merchandise inventory using the gross profit method | G. Gross profit method <ol style="list-style-type: none">1. Reason(s) for using gross profit method2. Compute estimated cost |

Activity Experience

Evaluation

- | | |
|---|---|
| A. Lecture/demonstration, transparencies | A. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made |
| B. Lecture/demonstration, transparencies, problem solving | B. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made |
| C. Lecture/demonstration, transparencies, problem solving | C. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made |
| D. Lecture/demonstration, transparencies, problem solving | D. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made |
| E. Lecture/demonstration, transparencies, problem solving | E. Have student complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made |
| F. Lecture/demonstration, transparencies, problem solving | F. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made |
| G. Lecture/demonstration, transparencies, problem solving | G. Have students complete with a minimum of 70% accuracy a multiple-choice, fill-in-the-blank, and problem-solving test. To achieve 70% accuracy, the student will complete a pre-test, test, and retest on the unit. Only the higher of the test or retest grades will be recorded |

Unit IX. Deferrals and Accruals

Principal Objective: To acquaint the student with a working knowledge of deferred and accrued adjustments.

Competency	Content Outline
A. To be able to distinguish between deferrals and accruals	A. Definitions 1. Deferrals 2. Accruals
B. To be able to record adjustments for deferred expenses	B. Recording deferred expenses 1. Distinguish accounts which represent deferred expenses 2. Compute amount of deferred expense 3. Record adjusting entry
C. To be able to record adjustments for deferred income	C. Recording deferred income 1. Distinguish accounts which represent deferred income 2. Compute amount of deferred income 3. Record adjusting entry
D. To be able to record adjustments for accrued expenses	D. Recording accrued expenses 1. Recognize where there is an accrued expense 2. Compute amount of accrued expense 3. Record adjustments for accrued expenses
E. To be able to record adjustments for accrued income	E. Recording accrued income 1. Recognize where there is accrued income 2. Compute amount of accrued income 3. Record adjustments for accrued income
F. To be able to show position of deferrals and accruals on balance sheet	F. Balance sheet positions 1. Deferred expenses 2. Deferred income 3. Accrued expenses 4. Accrued income
G. To be able to determine which deferral and accrual requires a reversing entry	G. Reversing entries 1. Deferred expenses 2. Deferred income 3. Accrued expenses 4. Accrued income

Activity Experience**Evaluation**

- | | |
|---|---|
| A. Lecture/demonstration | A. 100% accuracy using instant response |
| B. Lecture/demonstration, transparencies, problem solving | B. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made |
| C. Lecture/demonstration, transparencies, problem solving | C. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made |
| D. Lecture/demonstration, transparencies, problem solving | D. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made |
| E. Lecture/demonstration, transparencies, problem solving | E. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made |
| F. Lecture/demonstration, transparencies, problem solving | F. Have students complete with 100% accuracy textbook questions, exercises, and problems. This work is checked by the student and necessary corrections can be made |
| G. Lecture/demonstration, transparencies, problem solving | G. Have students complete with a minimum of 70% accuracy a multiple-choice, fill-in-the blank, and problem-solving test. To achieve 70% accuracy, the student will complete a pre-test, test, and retest on the unit. Only the higher of the test or retest grades will be recorded |

Unit X. Plant Assets and Intangible Assets

Principal Objective: To acquaint the student with a working knowledge of plant assets, related depreciation, and intangible assets.

Competency	Content Outline
A. To be able to determine initial costs of plant assets	A. Initial costs of plant assets 1. Cost of plant assets 2. Expenditures necessary to get in place 3. Expenditures necessary to get it ready for use
B. To be able to compute and record related depreciation	B. Depreciation of plant assets 1. Compute depreciation using straight-line method 2. Compute depreciation using units-of-production method 3. Compute depreciation using declining balance method 4. Compute depreciation using sum-of-years digits method 5. Compute depreciation using average depreciation method 6. Record transactions for each method of computation
C. To be able to record the disposal or sale of plant assets	C. Disposal or sale of plant assets 1. When disposing of asset, compute up-dated (accumulated) depreciation 2. Compute loss, if any 3. Record disposal 4. When selling asset, compute up-dated (accumulated) depreciation 5. Compute loss or gain, if any 6. Record sale recognizing loss or gain 7. Record sale not recognizing loss or gain
D. To be able to place depreciation on the income statement and the balance sheet	D. Position on financial statements 1. Income statement 2. Balance sheet

Activity Experience**Evaluation**

A. Lecture/demonstration,
transparencies

A. 100% accuracy using instant response method

B. Lecture/demonstration,
transparencies, problem
solving

B. Have students complete with 100% accuracy
textbook questions, exercises, and prob-
lems. This work is checked by the student
and necessary corrections can be made

C. Lecture/demonstration,
transparencies, problem
solving

C. Have students complete with 100% accuracy
textbook questions, exercises, and prob-
lems. This work is checked by the student
and necessary corrections can be made

D. Lecture/demonstration,
transparencies, problem
solving

D. 100% accuracy using instant response method

Competency**Content Outline**

E. To be able to recognize an intangible asset and record its related amortization

- E. Intangible assets and amortization
1. Definition of intangible assets
 2. Definition of amortization
 3. Computation of amortization
 4. Recording of amortization

Activity Experience**Evaluation**

E. Lecture/demonstration, transparencies, problem solving

E. Have students complete with a minimum of 70% accuracy a multiple-choice, fill-in-the-blank, and problem-solving test. To achieve 70% accuracy, the student will complete a pre-test, test, and retest on the unit. Only the higher of the test or retest grades will be recorded

Unit XI. Practice Set

Principal Objective: To bring together in a cohesive manner the learning experience in Units I. - VIII.

Competency

Content Outline

A. To be able to complete a practice set combining the elements in Units I. - VIII.

B. To be able to use the practice set to find essential information

A. Elementary elements of accounting in a business

1. Transactions
2. Closing process

B. Practical application

1. Find transactions
2. Read accounts
3. Find simple ratios

Activity Experience**Evaluation**

A. Demonstration**A. Account names, figures, and financial statements are checked for accuracy****B. Demonstration****B. A finding test composed of 25 questions is administered upon completion of the practice set. 70% accuracy is required**

BIBLIOGRAPHY

1. Books:

- Brock, Horace R. and others. Accounting: Principles and Applications. New York: McGraw-Hill Book Company, Current Edition.
- Carson, A. B. and Arthur E. Carlson. College Accounting (Parts 1, 2, 3). Cincinnati: South-Western Publishing Co., Current Edition.
- Carson, A. B. and Arthur E. Carlson. Secretarial Accounting (Parts 1, 2). Cincinnati: South-Western Publishing Co., Current Edition.
- Johnson, Glenn L. and James A. Gentry, Jr. Finney and Miller's Principles of Accounting. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.
- Niswonger, C. Rollin and Philip E. Fess. Accounting Principles. Cincinnati: South-Western Publishing Co., Current Edition.
- Thacker, Ronald J. Accounting Principles. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.

2. Periodicals:

- Accounting Review. American Accounting Association, 653 South Orange Avenue, Sarasota, Florida, 33577 (Quarterly, \$14 per year).
- Management Accounting. National Association of Accountants, 919 Third Avenue, New York, New York, 10022 (Monthly, Membership).

3. Audiovisual Aids

- Accounting: A Learning Experience (ALEX). Englewood Cliffs, New Jersey: Prentice-Hall, Current Edition.

Instructors may wish to prepare transparencies and/or slides relevant to each section.

Films and filmstrips relevant to sections.

4. Other Sources:

- a. Working papers, practice sets and other materials which are included with the selected textbook.

b. Associations

National Association of Accountants, 919 Third Avenue, New York, New York, 10022.

American Accounting Association, 653 South Orange Avenue, Sarasota, Florida, 33577.

APPENDIX

**ACCOUNTING I (Introductory)*
CONTENT OUTLINE FOR
SECRETARIAL SCIENCE PROGRAM**

I. Debits and Credits

- A. Accounting equation
- B. Theory of debits and credits
- C. Journalizing transactions
- D. The general ledger
- E. Posting transactions
- F. Balancing the ledger
- G. Finding errors

II. End of Period Work-Service Business

- A. The Worksheet
- B. Adjusting entries
- C. Financial statements
- D. Closing the ledger

III. Special Journals

- A. Use of special journals
- B. Four special journals
- C. Accounts receivable
- D. Accounts payable
- E. Use of subsidiary ledgers
- F. Balancing subsidiary ledgers and control accounts
- G. Purchase and sales discounts
- H. Purchase and sales returns and allowances
- I. Freight

Begin Practice Set

IV. End of Period Work-Merchandising Business

- A. Worksheet
- B. Adjusting entries
- C. Financial statements
- D. Closing the ledger
- E. Reversing entries

Finish Practice Set

***Prepared by Richard Jarvies, Accounting Department Head, Fayetteville
Technical Institute.**

V. Inventories

- A. Inventory systems
- B. Methods of costing inventory
- C. Methods of valuing inventory
- D. Perpetual inventory records
- E. Methods of estimating inventory

VI. Control of Cash and Non-Cash Assets

- A. Internal control
- B. Use of bank account
- C. Voucher register
- D. Check register
- E. Petty cash
- F. Other cash funds
- G. Other registers

VII. Payroll

- A. Computations of earnings and withholding
- B. Payroll register
- C. Individual payroll records
- D. Journalizing payroll transactions
- E. Internal control of payroll
- F. Computing employer's taxes
- G. Journalizing employer's taxes
- H. Recording payment of taxes
- I. Overview of payroll tax forms

SYLLABUS FOR
MACHINE DICTATION AND TRANSCRIPTION I, II, III
BUSINESS 211, 212, 213

This syllabus was compiled by Dr. R. Jean Overton, Program Development Division, Department of Community Colleges. Materials were abstracted from various sources including course outlines from the Secretarial Department, Central Piedmont Community College and Lenoir Community College. The syllabus was reviewed by the Secretarial Science Advisory and Curriculum Committees. Appreciation is expressed to the Advisory Committees and to Central Piedmont and Lenoir for their assistance.

DICTATION AND TRANSCRIPTION I, II, III

(Machine)

This syllabus is designed to be used in machine dictation and transcription. The syllabus can be adjusted for instruction in secretarial, legal, medical or office machine transcription. Instructors should utilize specialized letters, reports, forms and materials in accordance with the student's course of study.

BUSINESS 211, 212, 213 MACHINE DICTATION AND TRANSCRIPTION I, II, III

I. DESCRIPTION OF COURSES:

Machine Dictation and Transcription I

The student will develop the skill of transcribing at the typewriter materials appropriate to the course of study - secretarial or clerical (general, legal or medical secretarial or office education).

Machine Dictation and Transcription II

The student will develop the accuracy, speed and/or vocabulary to meet the machine transcription requirements of business and professional offices.

Machine Dictation and Transcription III

The student will continue to develop the speed and/or accuracy using material appropriate to the course of study - secretarial or clerical and business or professional office.

Series of numbers to use for Machine Transcription I, II, and III:

	<u>General</u>	<u>Legal</u>	<u>Medical</u>
I	BUS 211	211L	211M
II	BUS 212	212L	212M
III	BUS 213	213L	213M

II. COURSE OBJECTIVES:

Given the materials as presented in these courses, the student will:

Machine

1. Know the purpose and use of transcribing machines.
2. Define and use the operating features of a transcribing unit.
3. Dictate into a transcribing machine.
4. Transcribe from machines, mailable materials.
5. Apply correct office values and attitudes in working.

III. COURSE OVERVIEW:

- A. Basic machine transcription skills
- B. Typewritten transcription
- C. Office values and attitudes

IV. CREDITS, HOURS, PREREQUISITES:

- A. Two-six (2-6) quarter hours credit
- B. One-three (1-3) class hours per week; two-six (2-6) laboratory hours per week.
- C. Prerequisites:

Machine Transcription

- I. Ability to type
- II. Machine Dictation and Transcription I
- III. Machine Dictation and Transcription I, II

V. EVALUATION:

The evaluation is based on the completion of stated objectives.

Basic Criteria

Production ability
Quantity and quality of work
Progress
Speed and accuracy progress
Application of transcription procedures
Application of office attitudes

COMPETENCIES FOR
MACHINE DICTATION AND TRANSCRIPTION

Use dictation and transcription equipment.

Transcribe directly from transcription equipment.

Dictate effectively into transcribing equipment.

Transcribe mailable letters and other communications, articles and other materials.

Recognize responsibility in producing perfect copy by utilizing correct grammar, spelling, terminology and punctuation.

Accept responsibility in decision making.

Apply correct office value and attitude in all phases of work.

Competency

Content Outline

Activity Experience

Evaluation

MACHINE TRANSCRIPTION

I. Basic Machine Transcription Skills

Knowledge of the purpose and use of transcribing machines and equipment most commonly used in today's business office.

Ability to define and use the basic operating features of a transcribing unit.

9 Ability to dictate effectively into a transcribing machine.

A. Types of transcribing machines

1. Dictaphone
2. Voice writer
3. Transcription machine
4. Other machines

Introduce students to as many types of transcribing machines as possible - field trips or class demonstration by firms selling equipment.

Given the appropriate information the student will be able to identify the types of dictating-transcribing machines available and the trade name of at least three machines.

B. Operation of transcription machines

1. Placing belt on loading platform
2. Turning on machine
3. Inserting indication slip
4. Adjusting volume, speed and tone
5. Pressing pedal control to hear dictation and to backspace
6. Transcribing, listening, stopping and typing
7. Turning off machine
8. Removing belt
9. Using indication slip system

Practice in operating and transcribing from machines.

Have students prepare the transcribing unit for use.

Have students use machine to dictate as well as transcribe.

By demonstration, the student will identify the basic operating features of a transcribing unit.

Competency

Content Outline

Activity Experience

Evaluation

MACHINE TRANSCRIPTION

Machine

Ability to transcribe from machine, mailable materials.

II. Typewritten Transcription

- A. Review essential parts of a letter
- B. Review styles of letters
 1. Full block
 2. Modified block
 3. AMS letter
- C. Transcription rhythm
 1. Listen to the tape
 2. Stop the machine
 3. Type
- D. Editing machine transcript
 1. Mark or check capitalization, punctuation and spelling
 2. Mark or check names, titles, addresses
 3. Check for carbon copies (Review how to assemble a carbon pack.)
 4. Check for enclosures
 5. Mark tape or draw vertical lines through transcribed notes

Machine

Using the index tape, have students determine length of communication to be transcribed.

Using the index tape, have students detect correction and special instructions for transcribing; ie, analyze codes on tape.

Given the appropriate information the student will demonstrate the ability to transcribe from machine mailable materials.

10

BUS 211, 212, 213

Machine

Ability to use the dictionary.

Ability to use a reference manual and word-division manual.

Use correct punctuation.

Arrange special tabulations needed.

E. Number of words to be transcribed

1. How to estimate the approximate number of words in the item to be transcribed
2. How to set proper margins and spacing
 - a. Use letter placement guide
 - b. Estimation of placement

F. Proofreading and correcting errors

1. Proofread before removing from typewriter
2. Proofreading by two people (one person reads draft; other person follows on typed copy)
3. Proofreading requires complete concentration
4. Correct errors before removing from typewriter or after two people proofread

G. Finished correspondence or material

1. Neat and correct copy
2. How to present correspondence for signature:
 - a. Letter, carbon copy(ies), enclosure(s), if any, should be inserted under the flap of the envelope and placed on person's desk, face down or
 - b. Place correspondence in file folder for privacy if person is not at desk or out of the office
3. Compare envelope and correspondence before folding and inserting
4. Learn to accept responsibility for mistakes even though not entirely to blame

Machine

Have students transcribe on the typewriter dictated material from various sources.

Review letter forms, manuscripts, erasing technique and other transcription techniques.

Encourage students to be neat and orderly with supplies and equipment.

Review and have exercises in punctuation, spelling and grammar.

Use a wide range of material from easy to difficult and timed and untimed and varied dictations to refine transcription skills.

Use correspondence, articles and other materials related to the student's course of study.

Competency	Content Outline	Activity Experience	Evaluation
Ability to apply correct office values and attitudes in all phases of work.	III. Office Values and Attitudes	Role playing exercises to demonstrate ability to:	Given a role-playing exercise, the student will demonstrate the correct office value and attitude in working through the ability to act favorably in adverse situations and by demonstrating personality traits in keeping with required conduct in the office.
How to make decisions.	A. A mature attitude toward criticism	1. Accept criticism	
	B. Possess an open mind	2. Sense of humor	
	C. Confidence	3. Courtesy	
	D. Discipline	4. Confidence	
	E. Organization	Exercises to demonstrate organization, thoroughness, discipline, efficiency.	
	F. Thoroughness	Help students develop ability to depend on themselves by assigning special areas of classroom or business departments to individual students for their care and supervision.	
	G. Efficiency		
	H. Follow-up		
	I. Make decisions	Adapt procedures similar to business situations.	
	J. Sense of humor	Have students check letters prepared by other students and instruct them to sign only if they are mailable.	
	K. Mentally alert	Use guest speakers, such as successful secretaries, former students, personnel directors, etc.	
		Instill in students a sense of satisfaction in a job well done.	

BIBLIOGRAPHY

1. Books (General)

Kupsh, Joyce and others. Machine Transcription and Dictation. New York: John Wiley & Sons, Current Edition.

Leslie, Louis A. and others. Gregg Shorthand for Colleges: Transcription. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.

Patrick, Alfred L. and Susie J. Hess. Century 21 Shorthand: Dictation/Transcription Projects. Collegiate Series. Cincinnati: South-Western Publishing Co., Current Edition.

2. Periodicals

The Balance Sheet and Collegiate News and Views. South-Western Publishing Co., 5101 Madison Road, Cincinnati, OH, 45227. (Free)

Business Education Forum. National Business Education Association, 1906 Association Drive, Reston, VA, 22091. (\$5 membership rate included in dues; \$2.50 each, single copies)

Business Education World. Gregg Division/McGraw-Hill Book Company, 1221 Avenue of the Americas, New York, NY, 10020. (Free)

Journal of Business Education. Heldref Publications, 4000 Albemarle Street, N.W., Washington, DC, 20016. (\$15 institutions; \$10 individual; monthly)

The Office. Office Publications, Inc., 1200 Summer Street, Stamford, CT, 06904.

P.S. For Private Secretaries. Bureau of Business Practice Division, Prentice-Hall, Incorporated, 24 Rope Ferry Road, Waterford, CT, 06385. (\$15 per year; semimonthly)

The Secretary's Workshop and "Secretary's Workshop: Trends and Topics." Prepared and edited by the staff of the Bureau of Business Practice, 24 Rope Ferry Road, Waterford, CT, 06386. (Includes information on business vocabulary, secretarial skills, speed reading, work organization and business letters.)

The Secretary. The National Secretaries Association (International), 2440 Pershing Road, Suite 6-10, Kansas City, MO, 64108. (\$7 per year; monthly)

Today's Secretary. Gregg Division/McGraw-Hill Book Company, 1221 Avenue of the Americas, New York, NY, 10020. (\$5 per year; monthly)

"Viewpoints in Business and Office Education" Bronx, New York: MPC Educational Publishers, Division of Milady Publishing Corporation. (Free)

3. Audiovisual

Audiovisual Materials. Transparencies, tapes and records are available for most of the Gregg printed information in transcription. Order from materials catalogue of McGraw-Hill Book Company.

The Art of Machine Transcription. International Business Machines. Available from: Western Tape, P. O. Box 69, Mountain View, CA, 94040 or check with your local IBM representative for information.

Century 21 Shorthand: Skill-Building Tapes. Three sets. Cincinnati: South-Western Publishing Co., Current Edition.

Leslie, Louis A. and others. Gregg Dictation and Transcription: Individual Progress Method. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.

Transcription Techniques. Bronx, New York: MPC Educational Publishers, Current Edition. Step-by-step procedures for transcribing machine dictation and shorthand notes. Designed for use as an Introduction to Transcription or in Office Procedures. (\$95)

Transcription Skills for Word Processing. International Business Machines. Available from: Western Tape, P. O. Box 69, Mountain View, CA, 94040 or check with your local IBM representative for information.

Specialized Transcription Courses: Secretarial Practice, Legal Transcription, Medical Transcription and Word Processing Training. Consult local (D) Dictaphone representative or (D) Dictaphone Corporation, 120 Old Post Road, Rye, NY, 10580.

4. Other Sources

Related

Balsey, Irol W. Current Transcription Practices in Business Firms. Monograph 130. Cincinnati: South-Western Publishing Co., Current Edition.

Balsey, Irol W. and Samuel J. Wanous. Shorthand Transcription Studies. Cincinnati: South-Western Publishing Co., Current Edition.

Bowman, Wallace B. and Mary Ellen Oliverio. Shorthand Dictation Studies. Cincinnati: South-Western Publishing Co., Current Edition. (Grades 9-12)

Condon, A. and others. Transcribing Speed Studies. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.

_____. Transcription 36. New York: McGraw-Hill Book Company, Current Edition.

Gregg, John R. and others. Most-Used Words and Phrases. New York: Gregg Division/McGraw-Hill Book Company, Current Edition.

_____. Gregg Speed Building for Colleges. New York: Gregg Division/McGraw-Hill Book Company, Current Edition.

Leslie, Louis A. and Charles E. Zoubek. Dictation for Mailable Transcripts. New York: McGraw-Hill Book Company, Current Edition.

_____. Dictation for Transcription. New York: McGraw-Hill Book Company, Current Edition.

Liles, Parker and others. Typing Mailable Letters. New York: Gregg Division/McGraw-Hill Book Company, Current Edition.

Meyer, Lois and Ruth Moyer. Machine Transcription in Modern Business. New York: John Wiley & Sons, Current Edition.

Worsley, Jerome R. The Whole Thing. Write to Dr. Worsley at Durham Technical Institute, P. O. Drawer 11307, Durham, NC, 27703, for additional information.

Zoubek, Charles E. Gregg Expert Speed Building. New York: McGraw-Hill Book Company, Current Edition.

_____. Short Business Letters for Dictation and Transcription. New York: McGraw-Hill Book Company, Current Edition.

_____. Progressive Dictation with Previews. New York: Gregg Division/McGraw-Hill Book Company, Current Edition.

Reference

Christensen, Edward L. Century 21 Shorthand Dictionary. Cincinnati: South-Western Publishing Co., Current Edition.

Christensen, Edward L. and Devern J. Perry. 6,000 Most-Used Century 21 Shorthand Outlines. Cincinnati: South-Western Publishing Company, Current Edition.

Frazier, Lois E. and Harry R. Moon. Guide to Transcription (Reference Manual). Bronx, New York: MPC Educational Publishers, Current Edition.

Gregg, John R. and others. Gregg Shorthand Dictionary. New York: McGraw-Hill Book Company, Current Edition.

House, Clifford R. and Apollonia M. Koebele. Reference Manual for Office Personnel. Cincinnati: South-Western Publishing Co., Current Edition. (Grades 9-12)

Leslie, Louis A. 20,000 Words, Spelled and Divided for Quick Reference.
New York: McGraw-Hill Book Company, Current Edition.

Sabin, William A. The Gregg Reference Manual. New York: McGraw-Hill Book Company, Current Edition.

Silverthorn, J. E. and Devern J. Perry. Word Division Manual.
Cincinnati: South-Western Publishing Co., Current Edition.

National ZIP Code Directory. Washington, DC: United States Postal Service, Retail Operations Division, Customer Services Department, Current Edition. Purchase from Superintendent of Documents, U.S. Government Printing Office, Washington, DC, 20402. (Price, \$7.50) Updated, free of charge at local post office.

5. Specialized Books and References

Legal

Christensen, Edward L. Century 21 Shorthand Legal Dictionary.
Cincinnati: South-Western Publishing Co., Current Edition.

Kurtz, Margaret A. and others. 10,000 Legal Words, Spelled and Divided for Quick Reference. New York: McGraw-Hill Book Company, Current Edition.

Leslie, Louis A. and Kenneth B. Coffin. Handbook for the Legal Secretary. New York: McGraw-Hill Book Company, Current Edition.

Medical

Bredow, Miriam. Handbook for the Medical Secretary. New York: McGraw-Hill Book Company, Current Edition.

Byers, Edward E. Gregg Medical Shorthand Dictionary. New York: McGraw-Hill Book Company, Current Edition.

_____. 10,000 Medical Words, Spelled and Divided for Quick Reference. New York: McGraw-Hill Book Company, Current Edition.

Dorland's Illustrated Medical Dictionary. Philadelphia: W. B. Saunders Company, Current Edition.

Hadley, Anne. The Medical Secretary As A Word Technician.
Philadelphia: J. B. Lippincott Company, Current Edition.

JeHarned. Medical Terminology Made Easy. Chicago: Physicians' Record Company, Current Edition.

Medical Transcription Course. Rye, New York: Dictaphone Corporation, Current Edition.

Root, Kathleen and Edward E. Byers. The Medical Secretary: Terminology and Transcription. New York: McGraw-Hill Book Company, Current Edition.

Smither, Effie B. Gregg Medical Shorthand Manual and Dictionary. New York: Gregg Division/McGraw-Hill Book Company, Current Edition.

Taber, Clarence W. Cyclopedic Medical Dictionary. Philadelphia: F. A. Davis Company, Current Edition.

Terminology and Transcription for the Medical Secretary.
International Business Machines. Available from: Western Tape, P. O. Box 69, Mountain View, CA, 94040 or check with your local IBM representative for information.

Other

Adams, Dorothy and Margaret Kurtz. The Technical Secretary: Terminology and Transcription. New York: McGraw-Hill Book Company, Current Edition.

Laird, Eleanor J. Data Processing Secretary's Complete Handbook. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.

Reference

Erickson, Lawrence W. Basic Components of Office Work - An Analysis of 300 Office Jobs. Monograph 123. New York: South-Western Publishing Co., Current Edition.

Popham, Estelle L. and others. A Teaching-Learning System for Business Education. New York: Gregg Division/McGraw-Hill Book Company, Current Edition.

APPENDIX

FORSYTH TECHNICAL INSTITUTE

STUDENT'S GRADE SHEET

Student's Name _____

Final Problem Grade _____

Machine Transcription

<u>Belt Number</u>	<u>Points Received</u>	<u>Belt Number</u>	<u>Points Received</u>
<u>Belt 13A</u>		<u>Belt 16</u>	
Exercise 2	_____	Exercise 3	_____
Exercise 4	_____	Exercise 5	_____
Exercise 5	_____	Exercise 6	_____
<u>Belt 13B</u>		<u>Belt 17A</u>	
Exercise 9	_____	Exercise 2	_____
Exercise 11	_____	Exercise 3	_____
Exercise 12	_____	Exercise 5	_____
Exercise 13	_____	Exercise 6	_____
<u>Belt 14</u>		Exercise 8	_____
Exercise 2	_____	<u>Belt 17B</u>	
Exercise 4	_____	Exercise 9	_____
Exercise 5	_____	<u>Belt 18A</u>	
Exercise 8	_____	Exercise 2	_____
<u>Belt 15A</u>		Exercise 3	_____
Exercise 2	_____	<u>Belt 18B</u>	
Exercise 4	_____	Exercise 6	_____
Exercise 5	_____		
<u>Belt 15B</u>			
Exercise 6	_____		
Exercise 7	_____		
SUBTOTAL POINTS RECEIVED _____		TOTAL POINTS RECEIVED _____	

SCALE: 121-140 = A
 101-120 = B
 81-100 = C
 61-80 = D

Maximum A = 140 points
 Minimum D = 61 points

DEPARTMENT OF COMMUNITY COLLEGES

MEDICAL MACHINE TRANSCRIPTION

CONTENT OUTLINE*

OBJECTIVES:

The student will be able to:

1. Develop skills in operating the transcribing machine
2. Improve proficiency in word usage and correct punctuation
3. Use words and phrases commonly used in medicine, surgery and radiology
4. Review medical terminology and vocabulary including homonyms, prefixes and suffixes
5. Transcribe case histories and X-ray reports and other materials directly from a record or belt onto final, typed mailable and permanent forms

I. Business and Medical Communication and the Dictaphone Machine System

- A. Letters, medical forms and memorandums
- B. Advantages in skill in use of the dictating machine
- C. Variety of medical formats according to physician

II. Medical Transcription Belts

- A. Name
- B. Case number
- C. Major content of case histories
 1. Name, age, sex, race
 2. History
 3. Past history
 4. Physical examination
 5. Impressions
 6. Preoperative diagnosis
 7. Past operative diagnosis
 8. Operation
 9. Gross findings
 10. Surgical, medical and other procedure descriptions
 11. Recommendations
 12. Other
- D. Radiologic reports
 1. Findings
 2. Conclusions

*Developed by Dr. Vercie M. Eller, Health Occupations, Program Development Division and Bobby L. Anderson, Director, College Transfer and General Education, Department of Community Colleges.

III. Medical Transcription Belt #1

- A. Benign tumor of right breast
- B. Diabetic gangrene, right middle toe
- C. Varicose veins, right leg
- D. Gastric ulcer

IV. Medical Transcription Belt #2

- A. Right inguinal hernia
- B. Possible acute appendicitis
- C. Mild traumatic shock
- D. Bleeding duodenal ulcer
- E. Amputation of right middle finger
- F. Fibroadenoma of right breast
- G. Gastrointestinal flu

V. Medical Transcription Belt #3

- A. Letter dictated from one physician to another concerning patient of another physician
- B. Loss of function of right index finger, due to fibrous reaction secondary to primary tendon repair
- C. Cholecystostomy

VI. Medical Transcription Belt #4

- A. Left inguinal herniorrhaphy
- B. Oblique fracture of right mid-shaft tibia
- C. Probable fracture of both feet due to fall from a high place
- D. Manipulation and reduction of comminuted fractures and application of bilateral long leg casts
- E. Removal of supernumerary nipple

VII. Medical Transcription Belt #5

- A. Appendectomy
- B. Bronchoscopy and removal of a foreign body
- C. Repair of umbilical and epigastric hernia
- D. Acute appendicitis, mesenteric lymphadenitis

VIII. Medical Transcription Belt #6 and #7

- A. Treatment of burns in a mass disaster
- B. Continuation of treatment of burns in a mass disaster

IX. Medical Transcription Belt #8

- A. Partial, chronic, lower bowel obstruction
- B. Cerebral contusion; acute cervical strain resulting from blow with heavy object
- C. Acute lumbosacral sprain; rule out ruptured intervertebral disk

- D. Excision of small foreign body from right lateral area of neck
- E. Cholecystectomy and appendectomy
- F. Lower gastrointestinal hemorrhage
- G. Reduction of incarcerated hernia and inguinal herniorrhaphy

X. Medical Transcription Belt #9

- A. Presentation of case: enlarged cervical lymph nodes
 - 1. Clinical diagnosis
 - 2. Anatomical diagnosis
- B. Presentation of case: Jaundice
 - 1. Clinical diagnosis
 - 2. Anatomical diagnosis

XI. Medical Transcription Belt #10: Radiology

- A. Case No. 1: X-ray findings of fracture of left forearm and left elbow
- B. Case No. 2: X-ray findings of ulcer of duodenal bulb
- C. Case No. 3: X-ray findings of oblique comminuted fracture of right humerus
- D. Case No. 4: X-ray examination of pelvis and left hip
- E. Case No. 5: X-ray findings of fetus; seven months development
- F. Case No. 6: Chest X-ray; bronchial tract irritation
- G. Case No. 7: X-ray indicating healing process of left fibula and left tibia
- H. Case No. 8: Reexamination by X-ray of fracture of fifth metacarpal bone
- I. Case No. 9: Skull X-ray findings
- J. Case No. 10: Barium enema X-ray of enteric colon and loops of distal ileum
- K. Case No. 11: X-ray of chest indicating calcification of left hilum
- L. Case No. 12: X-ray of thorax and thoracic spine
- M. Case No. 13: Three hour film of gastrointestinal tract
- N. Case No. 14: Lateral view of sacrococcygeal spine
- O. Case No. 15: X-ray of left hand
- P. Case No. 16: Examination of right shoulder region; chest film
- Q. Case No. 17: Gallbladder X-ray; findings of complete GI Series
- R. Case No. 18: Chest X-ray with abnormal findings of mid-lung field
- S. Case No. 19: Film of chest
- T. Case No. 20: Normally functioning gallbladder
- U. Case No. 21: Excretory urogram series
- V. Case No. 22: Pelvic X-ray shows fetus development and position
- W. Case No. 23: Chest X-ray; recent bronchitis
- X. Case No. 24: Reexamination of left hip for progress of Perthis disease

XII. Words and Definitions Used in Case Reports, Medical Charts, X-Ray Reports and Others

XIII. Words Commonly Used in Surgeries According to System.

- XIV. Phrases Commonly Used in Medicine and Surgery
- XV. Homonyms
- XVI. Prefixes
- XVII. Suffixes

SUGGESTED TEXT:

Medical Transcription Course. Rye, New York: Dictaphone Corporation,
Current Edition.

SUGGESTED REFERENCES:

Byers, Edward E. 10,000 Medical Words, Spelled and Divided for Quick
Reference. New York: McGraw-Hill Book Company, Current Edition.

Dorland's Illustrated Medical Dictionary. Philadelphia: W. B. Saunders
Company, Current Edition.

JeHarned. Medical Terminology Made Easy. Chicago: Physicians' Record
Company, Current Edition.

Taber, Clarence W. Cyclopedic Medical Dictionary. Philadelphia: F. A.
Davis Company, Current Edition.

ELEMENTS THAT MAKE FOR MAILABILITY OF LETTERS*

I. General Appearance

1. Good margins
2. Regular type impressions resulting from good rhythm
3. Good erasures
4. No fingerprints, smudges, or other marks on the paper
5. No strikeovers

II. Spelling

A single misspelled word, even though corrected, will make the finest letter unmailable; therefore, be sure of your spelling.

III. Names and Figures

1. Special attention should be given to the inside address--people do not like to have their names misspelled.
2. Be sure that you are familiar with names used in the body of the letter. You are justified in asking your employer concerning names with which you are not familiar.
3. A single error in a word will make the letter unmailable.

IV. Punctuation

Although a letter is still mailable even though the punctuation does not live up to the best authority, any punctuation that changes or does not make sufficiently clear the intent of the dictator makes the letter unmailable.

V. English

The violation of any well-established grammatical principle makes your letter unmailable. The fact that the dictator made an error when dictating the letter does not permit you to repeat the same error.

VI. Context

Most employers will allow a certain amount of freedom in transcribing dictation. However, you cannot change the meaning of the sentence.

VII. Word Division

Any major violation of good rules for word division will make your letter unmailable.

VIII. Capitalization

The more important and generally accepted rules in capitalization must be observed.

*Developed by Secretarial Science Department, Central Piedmont Community College, Charlotte, North Carolina.

PUNCTUATION-RULES MOST USED IN BUSINESS COMMUNICATIONS*

Commas

1. Separate the parts of a compound sentence connected by a coordinate conjunction (and, but or nor) with a comma.
 - a. Jack is my older brother, and Jill is my younger sister.
 - b. The weather in the northwest portion of the country has been quite wintery, but we have had only warm weather.
 - c. The United States must remain strong in its economic policy, or the entire world might suffer a great depression.
2. An introductory adverbial clause beginning with when, as, after, etc., is set off from the main clause by a comma. (If the adverbial clause follows the main clause in its natural order, the comma is omitted.)
 - a. When you have finished your term paper, you may help John with his homework.
 - b. After Jack had planted the garden, he watered it thoroughly.
 - c. As you have already had many of the courses required, you may receive credit by examination.
3. Use commas to separate the parts of dates and addresses.
 - a. Thursday, June 15, 1970
 - b. Route 2, Box 215, Whynot, NC 20209
4. Long introductory phrases and those containing a gerund, participle or infinitive are usually followed by a comma. Some grammarians say that an introductory phrase of fewer than five words does not need a comma following it. Sometimes the use of the comma here is optional if the reading is not difficult to understand.
 - a. In thirty-two years of teaching in public schools, she had not been absent a day. (long)
 - b. Before retiring, he read for an hour. (gerund)
 - c. During the day he worked diligently. (short, no comma needed)

*Developed by Secretarial Science Department, Central Piedmont Community College, Charlotte, North Carolina.

5. Words, phrases and clauses when used in a series, are separated by commas.
 - a. I used butter, sugar and eggs in this recipe
 - b. I measured the sugar, creamed the butter, and beat the eggs before mixing them.
6. Use commas to set off parenthetical elements. Parenthetical elements may include the following:
 - a. Expressions such as however, nevertheless, in the first place, on the other hand, for example.
 - b. Non-restrictive clauses or phrases--those that add information but are not necessary to the meaning of the sentence. When a clause is begun with who or which, it is usually non-restrictive.
 - c. Nouns in apposition or direct address.
 1. Mr. Smith, our biology teacher
 2. And so, Mr. Smith, we shall, etc.

Semi-Colons

1. Use semi-colons between main clauses of a compound sentence when the conjunction is omitted.

Today I shall work hard; tomorrow I shall rest.
2. Use a semi-colon between main clauses of a compound sentence when the conjunction is used if commas are used within the elements of the compound sentence.

As I have a great deal of work to do today, I shall work hard; but tomorrow I shall rest.
3. Use semi-colons before such expressions as namely, that is, as, i.e., when these words introduce an enumeration of several items, or an illustration that is a complete clause.

In order to complete our task on time we shall have to do many things; namely, organize each part of the task, assign each member one thing to do; and proceed with caution.

Colon

1. Use after salutation of a letter if mixed punctuation or closed punctuation is used.
2. Use after a formal introductory statement.

At Gettysburg President Lincoln gave his famous address: Four score and seven years ago, our fathers brought forth on this continent a new nation, conceived in liberty and dedicated to the proposition that all men are created equal. Now we are one

3. Between hours and minutes as 3:30 p.m.

Numbers

1. Use words for numbers ten and under. Use figures for numbers above ten.

He has only one day left before the paper is due.

There will be a holiday period of 31 days.

2. If the number is the first word in a sentence, spell it in words.

Thirty-one days is the length of the holiday period.

3. Use figures for the following:

- a. Day of month when it follows name of month, as June 10.

Do not use the d, or nd after numbers.

- b. House numbers, as 1265 Chestnut Street.

- c. Street numbers above ten, as 35th Street.

- d. Sums of money, as \$10 (no decimal, no zeros), \$10.50, 5 cents
(not \$.05)

- e. Percentages, as 5 percent (not 5%)

- f. Serial and model numbers, as Model No. 158246, Serial No. 11358.
(no commas)

- g. Exact age, as: She is 100 years old. But approximate age is expressed by words, as about one hundred years old.

- h. Dimensions, as: The room is 12 by 15.

- i. Distances, as: Louisville is 115 miles from Bowling Green.

- j. Temperature, as 10°.

- k. Time, as: It is 4:30 p.m. But when o'clock is used, use words as:
It is four o'clock, use words.

- l. Pages of books, as: The quotation is on page 8.

- m. Decimals and mixed numbers, as 1 1/2, 1.33, 0.13, .003.

Spacing in Typewritten Communications

1. Space twice after the period, question mark, exclamation point.
2. Space twice after a colon within a sentence.
3. Space once after a comma, semi-colon, a final quotation mark, an apostrophe at the end of a word, a right parentheses or bracket.
4. Space once between a whole number and a fraction when you use the diagonal and make your own fractions, as 1 1/3.

Order of Punctuation with Quotation Marks

1. At the end of a quotation, the period and comma are always placed inside the quotation mark.
2. The question mark and exclamation point or a dash is placed outside the quotation mark if it punctuates the entire sentence.
3. The question mark, exclamation point or dash is placed inside the quotation if it punctuates only the quotation.

Capitalization

Do Capitalize

1. Proper names
2. Members of national, political, religious, regional groups, as American, French, Republican, Communist, Southern, Methodist.
3. Geographical, as Atlantic Ocean, Ohio River, Mecklenburg County.
4. Organizations, as American Cancer Society, The United Nations, Alpha Sigma.
5. Streets, Buildings, Ships, Trains, etc. as North Tryon, Independence Building, Queen Mary, Dixie Flyer.
6. Historical periods, documents, etc., as The Civil War, The Constitution.
7. Calendar days and months, special events, as Monday, Tuesday, January, February, Christmas, Thanksgiving Day.
8. Diety and Scriptures, as God, Jehovah, Holy Trinity, Old Testament.
9. Abbreviations if the words abbreviated are capitalized as FBI, WAC, but not mph.

10. Titles preceding proper names, as Mr. Brown, Judge McMillian, Aunt Meb, Cousin Sam (In family relationships, capitalize when followed by name, but not when preceded by possessive pronouns, as Brother Bill, or my brother Bill).
11. Capitalize such words as club, lake, river, building, street, county, etc., only when they are an essential part of a proper name. Be careful not to over-use capitals.
12. Capitalize the first letter of each word in the title of books, plays, etc., except articles and short prepositions and conjunctions.
13. First word after a colon when the colon introduces a complete passage or sentence.
14. First words of a long quotation.

Do not capitalize

1. Club, school, building, etc., unless they are essential parts of proper names.
2. Directions, as southeast, northwest, etc.
3. Course names unless followed by a number or derived from a proper name. I like history. I am taking HIS 105. He is learning English.
4. Seasons, as, It is time to plant a fall garden.

Hyphens are used:

1. To indicate word division at the end of a line.
2. Between two or more words that serve as a compound modifier of a noun. When such a compound adjective follows a noun, the words are not hyphenated.
3. With prefixes as ex, self.
4. Compound numbers written as words, fifty-first anniversary.
5. When several hyphenated compound words have a common noun and the common word is omitted in all but the last compound word, use the hyphens thus: second-, third-, and fourth-floor apartments.
6. Do not divide the second part of a compound word when a prefix (such as self, ex, etc.) is used; self-controlled, ex-officio.

PART 3: APPLICATIONS OF THE TEACHING-LEARNING SYSTEM

Figure 10.9 Checklist for identifying problems during typewriting transcription

Week of _____, 19____	Name of Student _____				
	Reel Number				
Identification and correction errors					
Proofreading	_____	_____	_____	_____	_____
Erasing	_____	_____	_____	_____	_____
Corrections	_____	_____	_____	_____	_____
Letter style and placement					
Placement on page—horizontal	_____	_____	_____	_____	_____
Placement on page—vertical	_____	_____	_____	_____	_____
Attention line	_____	_____	_____	_____	_____
Subject line	_____	_____	_____	_____	_____
Syllabication at end of line	_____	_____	_____	_____	_____
Machine manipulation					
Crowding	_____	_____	_____	_____	_____
Spreading	_____	_____	_____	_____	_____
Tabulation	_____	_____	_____	_____	_____
Ribbon too light	_____	_____	_____	_____	_____
Keys need cleaning	_____	_____	_____	_____	_____
Information					
Inside address inaccurate	_____	_____	_____	_____	_____
Salutation inaccurate for inside address	_____	_____	_____	_____	_____
Complimentary close	_____	_____	_____	_____	_____
Initials or enclosures	_____	_____	_____	_____	_____
Names inaccurate	_____	_____	_____	_____	_____
Numbers inaccurately written	_____	_____	_____	_____	_____
English grammar					
Spelling	_____	_____	_____	_____	_____
Punctuation	_____	_____	_____	_____	_____
Capitalization	_____	_____	_____	_____	_____
Syllabication	_____	_____	_____	_____	_____
Shorthand					
Transcription—incorrect outline	_____	_____	_____	_____	_____
Context meaning incorrect	_____	_____	_____	_____	_____
Cannot decipher outline	_____	_____	_____	_____	_____
Omitted shorthand outline(s)	_____	_____	_____	_____	_____

"From A TEACHING-LEARNING SYSTEM FOR BUSINESS EDUCATION by Popham, Schrag and Blockhus. Copyright © 1977 by McGraw-Hill, Inc. Used with permission, p. 228."

Figure 10.10 Process observation checksheet

Date of Observation _____		Name of Student _____	
Activity	Yes	No	Comments by Teacher
1. Types rhythmically			
2. Keeps eyes on notebook			
3. Syllabicates without hesitation			
4. Handles papers quickly			
5. Handles carbon pack quickly			
6. Wastes no time in erasing and correcting			
7. Utilizes reference sources quickly			
8. Sets up letter form quickly			

Figure 10.12 Form for self-evaluation of transcripts

Blank School											
Mailable Letters											
Date _____, 19____					Speed of dictation _____						
Time of transcription _____					Words a minute transcribed _____						
Reel no. _____											
Ltr. No.	Total Body	Date	Inside Address	Comp. Close	Carbon	Subject	Attn. Line	Ident. Initials	Enclosure	Envelope	TOTAL

Total mailable words transcribed _____

Add the following points whenever they are used in transcription

Date	5	Attention Line	5
Inside Address	15	Identification Initials	3
Complimentary Close	10	Enclosure	3
Carbon (each)	10	Envelope (each)	25
Subject Line	5		

INSTRUCTIONS: Evaluate your letters and mark as "M" for mailable and "U" for unmailable and list above only those you consider mailable.

Arrange all letters, both mailable and unmailable, in numerical order and staple with this sheet on top and hand in.

"From A TEACHING-LEARNING SYSTEM FOR BUSINESS EDUCATION by Popham, Schrag and Blockhus. Copyright © 1977 by McGraw-Hill, Inc. Used with permission, pp. 229, 232."

SYLLABUS FOR
SECRETARIAL/GENERAL OFFICE APPLICATIONS
BUSINESS 215

This syllabus was developed by Jean W. Woolard, Plymouth High School; Lou Clark, Eastern Alamance High School; Nancy I. Shook, Haywood Technical Institute. Information on "Secretarial Internship" was supplied by Jenell N. Hebert, Blue Ridge Technical Institute. The syllabus was reviewed by the Secretarial Science Curriculum Advisory Committee.

Appreciation is expressed to the individual contributors, their respective institutions and to the Advisory Committee.

BUS 215 SECRETARIAL/GENERAL OFFICE APPLICATIONS

I. DESCRIPTION OF COURSE:

The student will develop occupational competencies through experiences and practice in a simulated office or through on-the-job experience in a cooperative program and be given opportunities to apply knowledge acquired in previous secretarial or general office studies. The student will be supervised and coordinated by the instructor and/or employer. The student will participate in making necessary decisions relating to business and office operations, organizational division of responsibilities and implementation of decisions.

II. COURSE OBJECTIVES:

This area of instruction will enable students to:

1. Apply secretarial/general office knowledge acquired in prerequisite studies to an actual office situation by working in a simulated office or through on-the-job experience.
2. Deepen their understanding of office operations and of supporting activities and responsibilities.
3. Gain experience as a functioning member of an office planning and implementing team.
4. Develop their competencies by "real life" experiences related directly and/or indirectly to office work.
5. Recognize the implications, effects and consequences of office activities in the business process.

III. COURSE OVERVIEW:

- A. The office
- B. Personal appearance and business ethics
- C. Securing employment
- D. Organization of work
- E. Attitude
- F. Typewriting
- G. Reception responsibilities
- H. Telephone techniques
- I. Dictation
- J. Correspondence
- K. Records management
- L. Mailing
- M. Duplication
- N. Calculating
- O. Purchasing and receiving
- P. Accounting
- Q. Travel arrangements
- R. Conferences and meetings
- S. Oral communication
- T. Research
- U. Supervision and training

IV. CREDITS, HOURS, PREREQUISITES:

- A. On campus, regular class - three (3) quarter credit hours (1-4-3)
Simulation program - six (6) quarter credit hours (1-10-6)
Cooperative education program - four (4) quarter credit hours
(1-9-4)
- B. One (1) class hour per week; four-ten (4-10) laboratory
- C. Prerequisite: Completion of secretarial or general office course
work or approval of instructor.

V. EVALUATION:

Evaluation may be based on evidence that demonstrates the student's:

- 1. Fulfillment of responsibilities assigned and/or assumed.
- 2. Initiative in office activities and participation.
- 3. Productivity as reported in weekly productivity reports.
- 4. Constructive, explicit and feasible suggestions for the improvement
of one or more aspects of the office operation as a whole.

INTRODUCTION

A good way to develop employment skills in secretarial and general office or other educational programs is through student application of academic knowledges, skills and attitudes through work experience. Several options are open to students: cooperative education, simulation, internship, etc.

When employment is used, it should be considered an essential element in the educational process and should be related to the field of study in which the students are engaged. Many of the learning experiences suggested in this guide can be adapted for completion at the students' employment sites.

Through application of classroom-learned theory in a work situation, study becomes more meaningful to the student. Also, the student has the opportunity to learn the importance of reliability, cooperation, judgment and other qualities associated with a successful worker.

INSTRUCTIONAL GUIDELINES

This area of instruction is designed to develop the student's occupational competencies. The student should be supervised and coordinated by the instructor and/or employer with student involvement in decision-making about various aspects of office work.

This syllabus is designed for on-the-job and on-campus activities for students in the secretarial/general office programs. Depending on the approach used, some modifications will need to be made. A condensed description of the cooperative education program, simulation and internship are provided as well as suggestions for conducting the course.

The student should also be involved in various aspects of office management. Class discussions, evaluation of all activities and responsibility for implementation are suggestions for accomplishing this concept. Student responsibilities should be rotated to achieve as much experience as is feasible in the different business and office activities.

The ideal time interval for the participation of any class or student should not be less than one quarter. Each class or student should be given the opportunity to have a complete experience from initial planning to the culmination and final evaluation. Records kept by previous classes can and should be used as a guide.

The curriculum advisory committee should be informed of the non-competitive objectives of this business and office operation and their advice and cooperation be enlisted for possible loans and/or donations of supplies and equipment and for the name of possible suppliers.

The NOBELS System is identified in this syllabus. These competencies were identified by the Curriculum Advisory Committee. Student application of experiences learned in the total program is important in this part of the program. Therefore, the instructor and the student will have to decide if these competencies meet the criteria of the particular job situation and select others if those identified are not applicable.

A bibliography is not identified for the syllabus but a selected bibliography is included for the section on cooperative education and on simulation.

Competency

Content Outline

Activity Experience

Evaluation

Define the term "office" and discuss the classifications of offices with respect to type and size.

I. The Office

A. Define "office"

Reading assignment

B. Types of business offices

Lecture/discussion

1. Identify the various types of business offices
 - a. Governmental
 - b. Manufacturing
 - c. Public utility
 - d. Financial, etc.

Obtain definitions of "office"

2. Discuss current practices and procedures
3. Jobs available in each type of office

Collect information on the offices to illustrate types, sizes, practices and procedures, jobs available, etc.

Have representatives from various offices as guest speakers.

C. Identify offices by size

Given an objective- or subjective- test, the student will be able to define the term "office" and discuss the classifications of offices with respect to type and size.

Competency

Content Outline

Activity Experience

Evaluation

Demonstrate knowledge of the principles of good grooming, and business etiquette and ethics by exhibiting a good "office image."

II. Personal Appearance and Business Ethics

- A. Effects of personal appearance and behavior patterns on job success
- B. Consistently exhibit good grooming by dressing suitably for the office
- C. Abide by the principles of office etiquette and ethics

Reading assignment

Lecture/discussion/demonstration

Have student demonstrations, and films relating to the "right" and "wrong" way of personal appearance in the office.

Invite consultants to class to discuss and demonstrate.

References:

John T. Molloy, The Woman's Dress for Success Book (Warner Books, 1977).

John T. Molloy, Dress for Success (Follet, 1975).

Given a real or simulated office situation, the student will demonstrate his/her knowledge of the principles of good grooming and business etiquette and ethics by exhibiting a good "office image" to the satisfaction of the instructor or supervisor/employer.

Competency	Content Outline	Activity Experience	Evaluation
III. Securing Employment			
A. Demonstrate the ability to properly complete application forms, compose and type a letter of application, prepare resume and/or secure an interview by telephone.	A. Applying for a job 1. Properly fill in application form 2. Compose and type in correct form a letter of application requesting an interview 3. Prepare a resume 4. Request an interview by telephone	Reading assignment Lecture/discussion/demonstration Obtain various types of application forms and have students review. Have students fill in application form and letter of application.	A. Given in-basket problems in the classroom or simulated or real office, the student will demonstrate ability to properly complete application forms, compose and type a letter of application, prepare resume and/or secure interview by telephone.
B. Demonstrate proper procedures for obtaining a job interview and being interviewed.	B. Job interview 1. Exhibit proper dress and attitude for interview 2. Prepare for interview by gathering in advance supplies and work samples 3. Discuss personal and professional qualifications with prospective employer 4. Satisfactorily terminate the interview 5. Write follow-up letter thanking prospective employer for the interview	Have students prepare a resume. Have personnel manager from local employment agency visit class and explain the procedures for securing employment. Have class demonstration on job interviews.	B. Given in-basket problems in the classroom or simulated or real office, the student will demonstrate proper procedures for obtaining a job interview and being interviewed.

Competency

Content Outline

Activity Experience

Evaluation

IV. Organization of Work

A. Use decision-making in assessing priority work and situations in the office.

A. Work schedule

1. Plan work for oneself
2. Schedule work assignments utilizing judgmental skills in assessing priorities
3. Develop and improve work methods and procedures

Reading assignment

Lecture/discussion/demonstration

Design in-basket problems for students to use to assess priorities. (Information on how to develop in-basket problems is included in Appendix C.)

A. Given in-basket problems in the classroom or simulated or real office, the student will be able to assess priorities, completing all high-priority work first and other tasks in descending order of priority according to the guidelines established in the task description.

B. Organize the work area appropriately and efficiently.

B. Work area

1. Maintain the work area in a neat and orderly manner
2. Keep desk equipped with an adequate amount of office supplies and forms
3. Keep on hand employer's personal stationery
4. Maintain equipment, replacing ribbons on typewriters and calculators when necessary

Have students visit and/or have field trips to various offices.

Have office employee demonstrate the proper way to maintain work areas and how to determine priority work.

B. While being observed in a simulated or real office situation by the instructor using a criterion sheet and with no forewarning, the student will exhibit the ability to organize his/her work area.

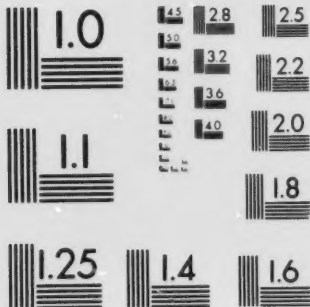
Competency	Content Outline	Activity Experience	Evaluation
Exhibits satisfactory attitudes toward work responsibilities, superiors, co-workers and customers.	V. Attitude A. Exhibit personal qualities desirable of an office employee in business, industry or government toward job responsibilities B. Discuss the ways in which the performance of an employee is affected by his/her attitudes C. Exhibit satisfactory attitudes toward superiors, co-workers and/or customers	Reading assignment Lecture/discussion/demonstration Role playing Have office manager and/or worker visit class to explain importance of attitude on the job.	Without forewarning and while being observed by the instructor/employer using a criterion sheet, the student will exhibit satisfactory attitudes toward his/her work responsibilities, superiors, co-workers and customers.

11

SIS 215

Competency	Content Outline	Activity Experience	Evaluation
	VI. Typewriting		
Demonstrate mastery of the principles of typewriting by correctly performing routine typewriting tasks.	A. Type on printed forms such as purchase orders, invoices, vouchers, receipts, accident reports, etc.	In-basket problems on various tasks involving typing - memorandums, letters, forms, etc. (Refer to Appendix C for information on developing in-basket problems.)	Given in-basket problems in the classroom or simulated or real office, the student will demonstrate mastery of the principles of typewriting by correctly performing routine typewriting tasks.
Example:	B. Type routine business letters with properly prepared carbon copies		
Types correspondence, memos and other items from form and rough draft required by employer.	C. Prepare addresses on envelopes or cards		
Types correspondence from dictation, incoming mail and other source documents.	D. Type and/or rule tabulated materials		
Types sales items from rough drafts, proposals, lists and other source documents.	E. Type a memorandum in correct form		
	F. Type manuscripts, speeches and reports in correct form from rough draft copy		
	G. Use proofreading symbols		
	H. Type in outline form		
	I. Type legal documents		
	J. Type articles and announcements		
	K. Type labels		
	L. Prepare materials for the printer or publisher		
	M. Compose copy at the typewriter		
	N. Justify right margins		
	O. Proofread typewritten copy		

Competency	Content Outline	Activity Experience	Evaluation
VII. Reception Responsibilities			
A. Ability to properly schedule appointments and conferences for the employer.	A. Scheduling appointments 1. Schedule appointments, engagements and conferences for employer 2. Record appointments, engagements and conferences on desk calendar 3. Keep employer's desk calendar up to date 4. Prepare a day's schedule and remind employer of engagements 5. Change calendars daily	Reading assignment Lecture/discussion Role playing	A. Given in-basket and/or simulated or real office situations, the student will give evidence of ability to properly schedule appointments and conferences for the employer.
B. Ability to properly receive office visitors Arranges reception room and coffee serving for employees and guests. Operates lost and found department.	B. Reception of visitors 1. Greet callers and visitors 2. Screen visitors who want to see employer 3. Direct visitors to the proper office or department 4. Act as a guide to visitors 5. Make proper introductions 6. Arrange reception room		B. Confronted with simulated or real business situations, the student will demonstrate ability to properly receive office visitors to the satisfaction of the instructor/employer.



MICROCOPY RESOLUTION TEST CHART
NATIONAL BUREAU OF STANDARDS
STANDARD REFERENCE MATERIAL 1010a
(ANSI and ISO TEST CHART No. 2)

Competency	Content Outline	Activity Experience	Evaluation
	VIII. Telephoning Techniques		
Use correct telephone techniques.	A. Answer incoming telephone calls	Reading assignment	After having completed a period of training on a tele-training system and given a number of specific situations that require decision-making and problem-solving abilities, the student will be able to place, transfer and accept incoming calls using correct telephone techniques.
Answers miscellaneous over-the-counter or telephone requests.	B. Properly record messages and place them on the employer's desk.	Demonstration	
Performs the duties of a receptionist.	C. Screen calls for employer	Train students on teletraining system.	
Answers telephone inquiries.	D. Schedule appointments by phone	Have local telephone representative/receptionist visit class to demonstrate and discuss telephone techniques.	
Places local and long distance telephone calls.	E. Take dictation over the telephone	Obtain information from local telephone company.	
Operates a switchboard.	F. Handle inquiries, requests and customer complaints over the phone		
Arranges schedules and patients' appointments.	G. Transfer calls		
Answers questions regarding patient billing.	H. Prepare for and place both local and long distance calls		
Arranges doctor/patient conferences.	I. Maintain record of long distance calls		
	J. Arrange for conference calls		
	K. Demonstrate general knowledge of PBX switchboard		

Competency

Content Outline

Activity Experience

Evaluation

IX. Dictation

Transcribe into mailable copy, machine dictation or shorthand dictation.

A. Machine transcription

1. Operate transcription unit
2. Take dictation directly at the typewriter
3. Transcribe in correct form from prerecorded tapes
4. Correctly punctuate letters, articles, manuscripts, reports, etc.
5. Use correct spelling when transcribing all materials

Lecture/discussion

Demonstration of transcribing machine.

Dictation to students.

Review of basic grammar.

Have students from other business programs dictate to secretarial/general office students.

Given a dictated tape and/or dictation to be taken directly at the typewriter or in shorthand, the student will transcribe into mailable copy, using correct format, within a minimum time limit.

B. Shorthand transcription

1. Transcribe in correct form from shorthand outlines
2. Take dictation directly at the typewriter
3. Correctly punctuate letters, articles, manuscripts, reports, etc.
4. Edit letters dictated by the employer
5. Use correct spelling when transcribing all materials

Problem-solving activities (in-basket) (Discussed in Appendix C)

Competency	Content Outline	Activity Experience	Evaluation
Ability to satisfactorily perform routine correspondence functions.	X. Correspondence A. Transcribe into mailable copy prerecorded dictation or dictation taken in shorthand and at the typewriter B. Compose correspondence from oral directives C. Make usable corrections on original and carbon copies D. When requested to do so, sign correspondence for employer in his/her absence E. Proofread and evaluate effectiveness of correspondence	Lecture/discussion In-basket problems (Discussed in Appendix C)	The student, provided with appropriate equipment and in-basket problems in a real or simulated office situation, will demonstrate ability to satisfactorily perform routine correspondence functions.

Competency

Content Outline

Activity Experience

Evaluation

XI. Records Management

Demonstrate mastery of the principles of records management by establishing and maintaining a filing system, as well as transferring and disposing of materials from the file.

Files materials such as legal, personnel and purchasing documents.

- A. Establish and/or maintain files using alphabetic, numeric, subject, chronological and geographical systems
- B. Sort and index materials for filing
- C. Make labels
- D. Place materials in file
- E. Control classified or confidential materials
- F. Periodically evaluate files, making revisions when necessary
- G. Keep card indexes, properly cross referenced, as well as a tickler file
- H. Take materials from files when requested by authorized individuals
- I. Search for misplaced materials in the files
- J. Supervise and control maintenance of the files
- K. Transfer records to inactive files
- L. Establish guidelines for disposition of records
- M. Dispose of unnecessary materials

Reading assignment

Lecture/discussion

Plan field trips to various business offices for observation of filing and records management systems.

Given a series of in-basket problems in the classroom or simulated or real office, the student will give evidence of his/her mastery of the principles of record management by establishing and maintaining a filing system, as well as transferring and disposing of materials from the files.

Competency	Content Outline	Activity Experience	Evaluation
	XII. Mailing		
A. Ability to process and distribute incoming mail.	A. Incoming mail - Sort, open, time stamp and read incoming mail - Attach pertinent correspondence to incoming mail - Make notes on incoming mail for employer - Distribute incoming correspondence, publications, supplies, blueprints, product samples, etc.	Lecture/discussion Demonstration and explanation of mail process. Develop and/or review manual explaining mail process. Problem-solving activities (Refer to Appendix C)	A. Given in-basket problems or simulated or real office situation, the student will demonstrate ability to process and distribute incoming mail to the satisfaction of the instructor/employer.
B. Knowledge of and ability to perform routine mailroom responsibilities.	B. Outgoing mail - Check outgoing mail for signatures and enclosures - Stuff and seal envelopes (manually) - Stuff, label and sort outgoing bulk mail - Use postage scales and meter to affix proper postage to surface and bulk mail as well as packages		B. Given a hypothetical or simulated or real office situation, the student will demonstrate knowledge of and ability to perform routine mailroom responsibilities to the satisfaction of the instructor/employer.
C. Ability to process outgoing mail.	C. Mailroom duties - Use U.S. Postal Manual for postage rates and types of mail - Process insured, certified, special delivery and registered mail - Properly wrap and tie packages - Process interoffice mail - Prepare, check and process mailing lists - Maintain incoming and outgoing correspondence register - Forward mail - Purchase postage - Keep record of postage used for surface and bulk mail, as well as for packages		C. Given a hypothetical or simulated or real office situation, the student will demonstrate ability to process outgoing mail to the satisfaction of the instructor/employer.

Competency

Content Outline

Activity Experience

Evaluation

Processes departmental incoming mail.

Prepares daily bulk mailing.

Sorts materials such as invoices, purchase orders, statements, checks and contracts.

Processes company outgoing mail.

Performs mailroom duties.

Delivers incoming and outgoing mail.

Processes incoming mail such as bank forms and checks.

19 Processes incoming hospital mail.

Processes departmental outgoing mail.

Processes certified, special delivery and registered mail.

Processes interoffice mail.

Attaches incoming mail to files for processing.

Delivers materials such as supplies, blueprints and product samples.

Arranges routing of publications.

Processes requests for standard product information.

Packages items for mailing.

Checks envelopes for additional contents with scanner.

Competency	Content Outline	Activity Experience	Evaluation
	XIII. Duplication		
Knowledge of and decision-making skills in duplicating.	A. Operate photocopy and thermofax copy machines	Lecture/discussion/demonstration	Given in-basket problems or simulated or real office situations, the student will demonstrate his/her decision-making skills and knowledge of duplicating processes by selecting the best method to be used, properly preparing the master, and operating the corresponding duplicating equipment to prepare the number of copies specified by the instructor/employer.
1. Process to use	B. Arrange for centralized department to duplicate materials	Explanation of duplicating processes to use	
2. Prepare master	C. Type and correct spirit master for spirit duplicator	Problem-solving activities (Refer to Appendix C)	
3. Operate equipment	D. Prepare thermal master	Obtain literature on various types of duplicating machines and copiers.	
Prepares duplicated materials.	E. Operate spirit duplicating machine		
	F. Prepare and correct offset master		
	G. Operate offset machine		
	H. Prepare and correct stencil for mimeograph		
	I. Operate mimeograph machine		
	J. Draw on trace artwork on stencils, spirit master units or offset masters		
	K. Prepare transparencies using thermal processes		

Competency	Content Outline	Activity Experience	Evaluation
	XIV. Calculators		
Ability to perform routine business calculations. Checks the accuracy of source documents such as sales, purchases, tax reports and forms. Performs routine check on such items as deposit slips, adding machine tapes and advices.	A. Check accuracy of invoices, deposit slips, sales, purchases, tax reports, etc. B. Use simple business mathematics to compute inventory values, sales tax, extensions, discounts, interest, etc.	Problem-solving activities (Refer to Appendix C) Obtain various types of business forms for students to discuss and use.	Given a ten-key printing calculator and in-basket problems in the classroom or simulated or real office, the student will demonstrate ability to perform routine business calculations.

21

BUS 215

Competency

Content Outline

Activity Experience

Evaluation

Demonstrate decision-making and problem-solving abilities for selecting, ordering and receiving office equipment, furnishings and supplies.

XV. Purchasing and Receiving

- A. Determine requirements for equipment and supplies
- B. Secure quotations from vendors for furnishings, equipment and supplies
- C. Select office furnishings, equipment and supplies
- D. Prepare purchase requisitions
- E. Type purchase orders and send to vendors
- F. Inspect materials received for completeness or damage
- G. Distribute supplies, publications, forms, etc.
- H. Check on supplies for reordering
- I. Renew magazine and newspaper subscriptions

Obtain office equipment and supply catalogues from various office vendors.

Have students order equipment and supplies for an office.

Schedule field trips to office equipment and supply stores.

Given in-basket or simulated or real office situations, the student will demonstrate decision-making and problem-solving abilities by following correct procedures for selecting, ordering, and receiving office equipment, furnishings and supplies.

Competency	Content Outline	Activity Experience	Evaluation
	XVI. Accounting		
A. Ability to accurately post, maintain and balance an accounts receivable subsidiary ledger. Types invoices from such documents as sales tickets, contracts and receiving reports. Completes sales reports. 23 Requests payment from delinquent customers.	A. Accounts receivable 1. Post entries from journals to an accounts receivable subsidiary ledger 2. Balance subsidiary ledger with general ledger account 3. Prepare and mail statements 4. Transfer debit and credit balances 5. Write or call delinquent customers 6. Age accounts receivable 7. Keep record of debts written off as uncollectible	Problem-solving activities (Refer to Appendix C) Have secretary or general office worker from accounting firm or other business firms visit class to discuss accounting responsibilities of the secretary or general office worker. Plan field trip to accounting firm to observe accounting activities performed by the secretary or general office worker.	A. Given in-basket problems in the classroom or simulated or real office, with appropriate equipment and forms, the student will demonstrate his/her ability to accurately post, maintain and balance an accounts receivable subsidiary ledger.
B. Ability to accurately compute payroll earnings, deductions, prepare checks and maintain individual payroll records. Prepares payroll. Prepares a dummy payroll.	B. Payroll 1. Maintain payroll register 2. Record information from time cards on payroll form 3. Calculate payroll deductions such as FICA tax, federal income tax, state income tax, insurance, etc., to determine gross pay 4. Write checks for payroll 5. Keep records pertaining to payroll tax deductions and remit when due 6. Keep individual earnings records 7. Prepare end-of-year W-2 Forms		B. Given the necessary information from time cards or attendance records in a classroom or simulated or real office situation, the student will demonstrate ability to accurately compute payroll earnings, deductions, prepare checks, as well as maintain individual payroll records.

Competency	Content Outline	Activity Experience	Evaluation
C. Ability to perform routine bank procedures. Prepares night deposits Prepares the bank deposit from cash receipts. Prepares reconciliation of bank account.	C. Banking procedures 1. Examine checks and money orders for correct amounts, dates and signatures 2. Endorse checks properly 3. Deposit checks and/or cash in the bank 4. Write and sign checks (if authorized) 5. Keep checkbook and stubs up to date so that current bank balance is accurately shown 6. Reconcile bank statement 7. Prepare night deposits		C. Provided with appropriate forms and equipment in the classroom or simulated or real office, the student will demonstrate ability to perform routine bank procedures to the satisfaction of the instructor/employer.
D. Ability to perform routine cashier duties. Records payments received.	D. Cash receipts 1. Act as cashier 2. Write receipts 3. Properly record payments in cash receipts journal 4. Prove cash daily 5. Approve customer's checks		D. The student, given in-basket problems in a real or simulated office, will demonstrate ability to perform routine cashier duties to the satisfaction of the instructor or supervisor/employer.
E. Ability to accurately post, maintain and balance an accounts payable subsidiary ledger. Records accounts payable.	E. Accounts payable 1. Check bills and invoices for accuracy 2. Give statements to supervisor for approval 3. Write checks in payment of approved bills, taking advantage of trade and quantity discounts 4. Record entries in accounts payable journal 5. Post entries from journals to an accounts payable subsidiary ledger 6. Balance subsidiary ledger with general ledger account		E. Given in-basket problems in a real or simulated office, the student will give evidence of his/her ability to accurately post, maintain and balance an accounts payable subsidiary ledger.
F. Ability to open, maintain balance and replenish a petty cash fund.	F. Petty cash 1. Open a petty cash fund 2. Pay approved amounts from the fund, preparing a voucher for each transaction 3. Maintain petty cash register 4. Balance and replenish fund		F. Given in-basket problems in a real or simulated office, the student will demonstrate ability to open, maintain, balance and replenish a petty cash fund.

Competency	Content Outline	Activity Experience	Evaluation
	XVII. Travel Arrangements		
Ability to prepare travel arrangements: (1) Itinerary, (2) Transportation schedules, (3) Hotel accommodations, etc.	A. Make transportation arrangements for bus, train or air travel	Problem-solving activities (Refer to Appendix C)	Given a hypothetical or real situation, the student will demonstrate ability to prepare in correct form detailed itinerary, arrange transportation schedules, as well as make and confirm hotel accommodations for the employer to the instructor's/ employer's standard of approval.
Arranges travel.	B. Reserve and confirm hotel and motel accommodations	Field trips to local travel agency, motel/hotel, airport to discuss planning travel.	
Processes travel vouchers.	C. Prepare an itinerary		
Arranges transportation from city car pool.	D. Prepare travel vouchers		
	E. Secure traveler's checks for employer		
	F. Obtain information and papers for foreign travel		

25

BUS 215

Competency	Content Outline	Activity Experience	Evaluation
	XVIII. Conferences and Meetings		
Ability to make all arrangements for a conference or meeting.	A. Arrange for the meeting or conference room	Discussion	After being presented with a typical office situation, the student will make all arrangements for a meeting or conference to the satisfaction of the instructor/employer.
Arranges conferences and meetings.	B. Help with decorations and/or refreshments for the meeting or conference	Problem-solving activities (Refer to Appendix C)	
Processes registration for conferences participants.	C. Mail out notices of meeting after checking attendance membership lists		
Arranges schedules for conference room.	D. Follow up on written notices by telephone		
	E. Prepare meeting agenda		
	F. Take minutes of meetings and transcribe in proper form		
	G. Distribute copies of minutes to authorized individuals		

Competency

Content Outline

Activity Experience

Evaluation

XIX. Oral Communication

Ability to exhibit satisfactory oral communication skills through: (1) answering or placing telephone calls, (2) greeting visitors and (3) communicating with superiors, etc.

- A. Confer with employer on matters of policy and company business
- B. Receive and implement employer's directives
- C. Give directives to other office workers
- D. Handle customer complaints
- E. Communicate in person or by telephone with other personnel or agencies
- F. Deliver messages
- G. Consistently demonstrate good use of the rules of grammar and communication

Discussion

Problem-solving activities
(Refer to Appendix C)

Plan field trip to office to observe communication system.

With no forewarning and while being observed by the instructor/ employer using a criterion sheet in a simulated or real office situation concerned with answering or placing telephone calls, greeting visitors or communicating with superiors and/or co-workers, the student will exhibit satisfactory oral communication skills.

Competency	Content Outline	Activity Experience	Evaluation
	XX. Research		
Ability to rapidly and accurately locate data through research procedures.	A. Use governmental, financial and other directories such as <u>Congressional Directory, Dun and Bradstreet, ZIP Code Directory, Official Guide of the Airlines, Official Railway Guide, etc.</u> B. Use various reference books, manuals and periodic literature (<u>World Almanac, Reader's Guide to Periodic Literature, Who's Who in America, Books in Print, etc.</u>) C. Gather data for a report D. Chart data E. Summarize articles, reports, lectures, etc.	Emphasize use of the library. Have students locate various data for office use.	Given a variety of reference books and specific information that may be found in the reference books, the student will give evidence of his/her ability to rapidly and accurately locate the desired data.

Competency	Content Outline	Activity Experience	Evaluation
XXI. Supervision and Training			
A. Ability to apply principles of supervision.	A. Supervision 1. Assign specific work to employees 2. Evaluate employee's work in relation to work standards and schedules 3. Prepare performance reports 4. Maintain personnel promotion folders 5. Investigate causes of trouble between employees	Problem-solving activities (Refer to Appendix C)	A. Given a simulated or real office situation, the student will demonstrate the ability to apply the principles of supervision while overseeing the work of two or more employees to the satisfaction of the instructor/employer.
29 B. Ability to properly orient and train an individual for productive employment.	B. Training 1. Administer employment tests to applicants 2. Properly orient new employees 3. Conduct on-the-job training of office personnel 4. Arrange for training aids, facilities and equipment		B. Given a simulated or real office situation and a check-list of points to be covered, the student will demonstrate the ability to properly orient and train an individual for productive employment.

NOBELS

The NOBELS' competencies listed below were considered valid in the survey by the Curriculum Advisory Committee and may be considered useful in this course. However, the subcommittee questioned their relevancy in this general course because of the specialization. We recommend that the instructor utilize these competencies based on his/her teaching approach and/or the needs of individual students.

02.03 Non-Computational Recording

02.03.01 The worker compiles reports and documents from sources such as supply lists, invoices and outlines. (Page 157)

04.03 Education

04.03.06 The worker receives activity funds and fees from students. (Page 201)

04.04 Securities

04.04.01 The worker processes stock certificates. (Page 204)

04.05 Hotel/Motel

04.05.03 The worker processes incoming mail and messages. (Page 210)

04.06 Hospital Services

04.06.01 The worker performs procedures for hospital admission from lists of patients or medical records. (Page 213)

07. Personnel

- 07.00.03 The worker arranges orientation of new employees. (Page 255)
- 07.00.04 The worker administers employment tests to applicants. (Page 256)
- 07.00.08 The worker compiles new employee personnel data from employment forms, questionnaires, worksheets and applications. (Page 261)
- 07.00.09 The worker arranges travel. (Page 262 - Section XVI)
- 07.00.10 The worker processes travel vouchers. (Page 263 - Section XVI)
- 07.00.11 The worker arranges transportation from city carpools. (Page 264 - Section XVI)
- 07.00.12 The worker processes merit award papers and pins. (Page 264)
- 07.00.14 The worker issues working papers to students. (Page 264)
- 07.00.25 The worker requests student nurses health examination appointments. (Page 264 - Medical)

08. Sales

- 08.00.01 The worker processes sales documents such as charge slips, purchase orders and warrants. (Page 266)
- 08.00.02 The worker processes requests by telephone and over-the-counter. (Page 266)

- 08.00.08 The worker processes classified ads and ad complaints. (Page 272)
- 08.00.11 The worker updates manuals, catalogs, price lists and customer accounts. (Page 274)
- 08.00.14 The worker requests new or extended advertising orders. (Page 276)
- 08.00.16 The worker mails product information and advertising materials to customers and prospective customers. (Page 276)
- 08.00.17 The worker processes supply requisitions for company salesmen. (Page 276)
- 08.00.21 The worker completes forms for installation of business equipment delivered. (Page 277)
- 08.00.22 The worker arranges travel for employees' speaking engagements. (Page 277)
- 08.00.27 The worker processes lay-away tickets and merchandise. (Page 278)
- 08.00.28 The worker calls businesses for report of company's goods sold or monies collected. (Page 278)
- 08.00.29 The worker arranges for a commercial photographer to take pictures of equipment manufactured. (Page 278)
- 08.00.31 The worker informs customer of insurance coverage. (Page 279)

09.02 Shipping

- 09.02.07 The worker distributes shipping listings. (Page 287)

09.03 Receiving

- 09.03.03 The worker issues a claim or an adjustment against the carrier/supplier for damage/short/overshipments. (Page 290)
- 09.03.04 The worker processes damage claims. (Page 290)
- 09.03.05 The worker processes freight bills for payment. (Page 290)
- 09.03.07 The library worker determines disposition of incoming books. (Page 290)

BIBLIOGRAPHY

1. Books:

Dallas Independent School District. Simulated Office: Student Learning Plan. New York: Harper and Row, Publishers, Inc., Current Edition.

Hanson, G. A. and Parker, E. C. "Simulation," National Business Education Yearbook, 1972.

Hopkins, Charles R. "Business-Sponsored Programs," The Emerging Content and Structure of Business Education, National Business Education Association Yearbook No. 8. Washington, DC: National Business Education Association, 1970.

2. Periodicals:

Adams, J. M. "Simulation Data Processing," Journal of Business Education, October, 1972.

American Vocational Journal, September, 1970. (Entire issue devoted to Simulation.)

Archer, Fred C. "Full Value From Simulated Activities," Business Teacher, May-June, 1968.

Archer, Fred C. "Simulate with Variety," Business Education World, Jan-Feb., 1970.

Bryant, Donald W. "Simulation: A Viable Teaching Method for Adults." For Adults Only, Spring, 1972. (Newsletter published by North Carolina Department of Community Colleges, Adult Education Division.)

Campbell, Patty Glover. "Job Selection Methods and Evaluation of Job Performance," Journal of Business Education, April, 1970.

Cook, Fred S., and Frank W. Lanham. "The Simulated Office vs. Actual Experiences," Business Education World, October, 1968.

Cooke, B. "Teaching via Simulation," Business Education Forum, January, 1973.

Church, Olive. "Career Cluster Concept in Office Simulation," The Journal of Business Education, February, 1974.

Drenth, J. A. "Simulation - Stimulation, Realism - Relevance," The Balance Sheet, October, 1966.

Forte, John. "A Model Office on a Shoestring," The Balance Sheet, November, 1969.

- Fuller, Robert, AM, Enterprises, Inc. Employee Handbook. 901 Fifth Street, Clovis, California.
- Fuller, Robert. "Student Involvement Achieved Through Creative Simulation," Business Education Forum, February, 1970.
- Funk, Beverly M. "A Blueprint for Successful Simulation," Business Education Forum, February, 1970.
- Goodrich, Elizabeth Ann. "Business Teachers - Get Out and Work!" Journal of Business Education, February, 1970.
- Huffman, Harry. "Your Role in Using Performance Goals," Journal of Business Education, May, 1970.
- Lewis, P. "Games, Simulations Allow Pupils Slice of Life," Nation's Schools, March, 1972.
- Moskovis, L. Michael. "Simulation Revisited," The Balance Sheet, November, 1970.
- Myers, Mary Lou and June M. Gaare. "An Employment Project Pays Off," Business Education Forum, October, 1970.
- Nichols, Dair W. "Why Not Simulation for Basic Business," The Balance Sheet, December, 1972 and January, 1973.
- Peck, J. Boyd. "How Do You Teach?" American Vocational Journal, April, 1970.
- Poland, Robert. "Various Types of Simulated Office Programs," Business Education Forum, May, 1973.
- Rasmussen, G. R. and L. W. Hughes. "Simulation: It's the Real Thing," National Association Secondary School Principals' Bulletin, March, 1972.
- Russell, Donald. "A Simulated Office Approach to Recordkeeping," The Balance Sheet, March, 1971.
- Sabin, William A. "Simulation in the Seventies: An Overview," Business Education World, September-October, 1971.
- Sawaia, Josephine. "Block-Time Approach Meets Student Needs," Business Education Forum, February, 1970.
- Schatz, Anne E. "Simulation in Office Machines . . ." Journal of Business Education, October, 1970.
- Schmidt, B. June. "Office Observation Shows a Need for Attitude Training," Business Education Forum, February, 1970.

Sith, Darlene R. "Intensive Office Laboratory--The Real Thing," Business Education Forum, February, 1970.

Smith, Virginia C. "Communications Unlimited Simulation," Journal of Business Education, April, 1973.

Spirer, Herbert F. "Mini-Simulation--A Remote Computer Terminal Teaching Aid for Statistics," Journal of Business Education, February, 1972.

Wolff, Nancy. "The 'Real' Side of Simulation," Business Education Forum. XXIX (January, 1975) p. 8.

Wunsch, Alan P. "Model Office Simulation Improves Interpersonal Relations," Business Education Forum. XXIX (January, 1975 pp. 5-7.)

3. Audiovisual Aids:

Instructors are encouraged to produce transparencies and slides as appropriate for each topic.

4. Other Sources

Block Time - Simulation: Individualized Office Instructional System.
Department of Secondary Education and Curriculum, Michigan State University, July, 1969.

Volume 1: Guide to Organizing and Operating the Block Time Simulation Program

Volume 2: Teacher's Manual and Curriculum Guide for the Block Time Simulation Program

Volume 3: Integrated Projects and Supplementary Materials for the Block Time Simulation Program

Volume 4: Office Simulation - Teacher and Student Kit for the Block Time Simulation Program

Volume 5: 100 Case Problems for the Block Time Simulation Program

Volume 6: A Study of a Block Time Schedule for Teaching Vocational Office Practice, Final Report. U.S. Department of Health, Education and Welfare, Bureau of Comprehensive and Vocational Education Research, July, 1969.

Horn, Robert E. (ed.) The Guide to Simulations/Games for Education and Training, Volume 2 - Business. Cranford, New Jersey: Didactic Systems, Inc., Current Edition.

5. Simulation Materials

American Enterprise Series. Available from Instructional Materials Services, The University of Texas at Austin, Division of Extension, Austin, Texas.

The Marketing Function
The Management Function
The Selling Function
The Promotion Function
Merchandising and Buying
Financial Management

Crawford, Lucy C. (Project Director). Developing and Testing Simulated Occupational Experiences for Distributive Education Students in Rural Communities, Volume II - Curriculum Materials. Washington, DC: Office of Education, U.S. Department of Health, Education and Welfare, Current Edition. (Final Report Dated February 28, 1976)

Gordon, Alice K. and others. Career Exploration in Marketing and Distribution. Belmont, Massachusetts: Contract Corporation, Current Edition. (For sale by the Superintendent of Documents, U.S. Government Printing Office, Washington, DC, 20402.)

Luter, Robert R. Projects. Austin, Texas: Distributive Education Department, Instructional Materials Laboratory, Division of Extension, The University of Texas at Austin, Current Edition.

Organization and Operation of a Model (Simulated) Store. Available from Vocational-Technical Division, Department of Education, 550 Cedar Street, St. Paul, Minnesota, 55101, (612-296-3306).

Simulations and Games. Columbus, Ohio: Ohio's Distributive Education Materials Laboratory, The Ohio State University, Current Edition.

APPENDIXES

- A. Cooperative Education
- B. Labor Laws
- C. Simulation
- D. Internship Program

APPENDIX A
COOPERATIVE EDUCATION

Cooperative education is perhaps one of the newest and fastest growing programs in the community colleges/technical institutes for integrating concepts and skills learned in the classroom with the world of work. Cooperative education is an educational/work plan designed to combine supervised on-the-job training in the occupational area of the student's career interest with classroom instruction directly related to on-the-job training and career interest.

The basic purposes of cooperative education are: (1) to give students practical occupational experiences as an integral part of their formal education and (2) to assist local businesses and industries in filling their needs for trained personnel.

Several guides and manuals are available from the Department of Community Colleges, Department of Public Instruction and the U.S. Office of Education, Health and Welfare that explain and give examples of cooperative education training programs. (Refer to bibliography for listings of these publications.)

If there is a Cooperative Education Department within your institution, guidelines and assistance for initiating the program for marketing and distribution will be provided by this Department.

Examples of courses of instruction offered by the Beaufort County Technical Institute Cooperative Education Department are as follows:

COE 100 COOPERATIVE EDUCATION SEMINAR

COURSE DESCRIPTION:

A seminar to be taken by each Co-op student during the quarter immediately preceding the first work assignment. This course is designed to prepare the student for entry into the Cooperative Program and to acquaint the student with responsibilities to the institute and to the employer.

Credit - 1 Quarter Hour

COURSE CONTENT:

- I. Introduction to Cooperative Education
- II. Co-op Rules and Regulations
- III. Student and Employer Responsibilities
- IV. How to Apply for a Co-op Work Station
 - A. The application form
 - B. The job interview
 - C. After the interview
- V. How to Begin Your Co-op Work Assignment
- VI. The First Work Assignment
 - A. The co-op evaluation form
 - B. Things to look for in a successful work assignment
 - C. The research paper
 - D. Issuance of co-op grades
- VII. Continuing Participation in Co-op Education
 - A. Alternation of work and study
 - B. Plans after graduation
- VIII. Completion of Co-op Participation

READING ASSIGNMENTS:

1. The Student in Society, by D. Keith Lupton. Littlefield, Adams and Co., 1969. (Introduction, Chapters 1, 3, 5, 9, 26, 27 and Appendices C and D.)
2. The Cooperative Education Handbook. (Published by BCTI Co-op Department.)
3. Various brochures and fact sheets as assigned.

CONTACT HOURS:

Six classroom sessions and six individual or small group counseling sessions.

COE 201 WORK EXPERIENCE I

COURSE DESCRIPTION:

Based on satisfactory completion of the second work session. Grade will be based on the employer's evaluation of student productivity and content of a project report (research in nature) submitted by the student.

Credit - Variable*

*Normal credit hours for the field work part of a Cooperative Program are determined by dividing the average number of hours worked per week, during a regular eleven week quarter, by 10 and rounding to the nearest whole number. Contact hours are determined by multiplying the number of hours worked per week by .3. A student may receive a maximum of four credit hours during any one quarter and a maximum of eight credit hours toward degree or diploma requirements.

TYPICAL WORK-STUDY PERIODS

A variety of work-study periods are used in cooperative education programs. Two of the more common, the alternate quarter and the parallel plan, are represented below. Note that the second alternate quarter plan has two work periods per section which allows students to complete a six quarter program in two academic years and provides the employer with one student position for the full year. The parallel (day share) plan is usually operated so that students work part of the day in a co-op work position while attending class the other part. Usually the educational program in the parallel plan is structured to allow completion in a minimum of eight quarters rather than six.

		F	W	Sp	S	F	W	Sp	S	F	W
Section A		*S	*W	S	W	S	W	S	W	S	S
Alternate Quarter											
Section B		S	S	W	S	W	S	W	S	W	S

		F	W	Sp	S	F	W	Sp	S
Section A		S	S	S	W	S	W	S	S
Alternate Quarter									
(Beginning co-op									
in the Second Year)									
Section B		S	S	S	S	W	S	W	S

| — ONE YEAR — |

		F	W	Sp	S	F	W	Sp	S
Section A		S	S	S	S	S	S	S	S
Parallel Plan									
(Day Share)		W	W	W	W	W	W	W	W
Section B		W	W	W	W	W	W	W	W
		S	S	S	S	S	S	S	S

$\frac{1}{2}$ day

$\frac{1}{2}$ day

$\frac{1}{2}$ day

$\frac{1}{2}$ day

*S - Study

*W - Work

SUGGESTED FORMS FOR COOPERATIVE EDUCATION

This syllabus provides several guides and forms for use in a cooperative program. Other guides and forms can be obtained from publications and other resources listed in the Cooperative Education Bibliography.

- Form I: Student Application for Participation in Cooperative Education Program
- Form II: Cooperative Education Program Guidelines
- Form III: Student Cooperative Education Agreement
- Form IV: Letter of Introduction
- Form V: Applicant's Status Report
- Form VI: Training Agreement
Training Plan Formats
- Form VII: Student Weekly Report
Cover Letter
Student Evaluation Forms
- Form VIII: Representative's Mid-Term and Final Reports
- Form IX: Coordinator's Employer Visit Report

FORM I*

STUDENT APPLICATION FOR
COOPERATIVE RETAIL MANAGEMENT

(Please return as soon as possible)

Name of Applicant _____

Address _____

Telephone No. _____

Are you now working? _____ If so, where? _____
What are your responsibilities? _____

How long have you worked for this firm? _____

Do you desire to work this summer? No _____ Yes _____; Part-time _____
or Full-time _____.

Do you desire to work each quarter? _____ or only the required quarters
(2nd and 6th)? _____.

Check the number of hours that you wish to work during the school year:

5 hours per week _____
15 hours per week _____
25 or more hours per week _____

What kind of company would you prefer to work with:

Drug _____
Clothing _____
Food _____
Food Service _____
Discount _____

Jewelry _____
Auto-equipment _____
Department Store _____
Other _____

Where would you prefer to work?

Mt. Airy _____
Elkin _____
Pilot Mtn. _____

Winston-Salem _____
Yadkinville _____
Other _____

(We will try to give student preference as far as possible in type of firm
and location.)

Any additional comments:

*Form developed by Surry Community College, Dobson, North Carolina.

FORM II*

COOPERATIVE EDUCATION PROGRAM GUIDELINES

RETAIL MANAGEMENT

Guidelines for Cooperative Work Study
"Extending the Educational Experience"

1. Absence from Assignment

In case of sickness or other emergencies necessitating a student's absence from the assignment, notify your employer as early as possible. Prolonged absences of more than two days should be reported to Coordinator.

2. Time Off

A student must be on the assignment regularly and punctually. He must not ask the employer for or take time off for any college requirements without first obtaining the consent of the Coordinator.

3. Lay-Off

Any student who is temporarily or permanently laid off must notify the Coordinator immediately. Effort will then be made to find a new work assignment.

4. Discharge or Desertion

A student who leaves his working assignment without prior approval of the Coordinator or who conducts himself on the job in a manner which results in his being discharged will be subject to disciplinary action. If discharge or desertion comes before completion of course requirements, the student will receive an "F" for the course.

5. Tenure

From the employer's point of view, he cannot run a reasonably productive organization with a continuous turnover of employees. From the student's point of view, we feel that it is necessary for the student to work at least one quarter in a work assignment in order to best gain from the experience. Therefore, if a student desires to change work assignments, he must discuss this with the coordinator at least one quarter in advance.

6. Completion of Course Requirements

Each co-op course will include written as well as work requirements that must be completed in order to receive a grade. For example, in BUS 130 the student must complete Student's Weekly Report for each week of employment during course and also at least 48 hours of on-the job work experience.

*Guidelines developed by Surry Community College, Dobson, North Carolina.

7. Credit and VA Benefits

In order for a student to get full credit for co-op, he must be a full-time student with 12 credit hours of course work. A veteran must be a full-time student beyond co-op hours in order to receive full VA benefits.

FORM IV*

EXAMPLE OF LETTER OF INTRODUCTION

FOR STUDENT INTERVIEW

Dear

This letter introduces you to _____
who would like an interview relative to co-operative employment. He is
in the _____ curriculum and will be available to start
work on _____.

Please complete the form below and return this letter to me (Receipt of
this letter in my office will constitute a bonafide offer of co-operative
employment). For any additional information, I can be contacted at
_____ Phone No. _____.

Sincerely,

*Abstracted from Cooperative Occupational Education by Frank A. Gourley,
Jr., North Carolina Department of Community Colleges.

FORM V*

APPLICANT'S STATUS REPORT
COOPERATIVE RETAIL MANAGEMENT

This student has been accepted ____ Yes ____ No.

We would like to have him start - Date ____ Time ____.
Salary ____ His working hours will be from ____ to ____.

He has accepted our offer ____ Yes ____ No.
(If so, the student should contact the institution to confirm this acceptance).

He will ____ will not ____ need a physical before starting work. If so, he should ____.
(We would appreciate it if the employer will make all arrangements for physicals directly with the student.)

Comments _____

(All qualified applicants will receive consideration for employment without regard to race, creed, color, sex or national origin.)

Date _____ Signature _____

☐ Please check if you want this report kept confidential.

Please return as soon after the applicant's interview as possible.

T H A N K Y O U !

Retail Management Coordinator
Surry Community College
Dobson, NC 27017

*Developed by Surry Community College, Dobson, North Carolina.

FORM VI

Marketing and Distribution

Basic Assumptions Regarding Instructional Plan

1. The primary goal of the marketing and distribution program is to prepare persons for careers in the field of marketing and distribution.
2. Students who are admitted and retained in marketing and distribution programs must have a tentative career goal and objective in the field of marketing and distribution.
3. The learning experiences provided both in the classroom and on the job should be relevant, realistic and timely.
4. Instructional plans must be individualized for each student as students are individuals and constantly involved in change or growth.
5. Instructional plans may be designed using input from: students, training directors, qualified and experienced businesspersons, parents, advisory committees, guidance personnel and the best available sources of the knowledges, skills, and attitudes which are needed to accomplish the occupational goals of the individual students.
6. Plans must be constantly evaluated, modified and revised if they are to be useful in directing the training of the students.

50

BUS 215

157

158

Tentative Career Objective:

Job Title:

Job Description:

Student:

Training Station:

Training Station Address:

O. E. Code:

D. O. T.

Age:

Training Director:

Telephone Number:

1. Indicate approximate date when student-trainee will begin the activity and when the activity has been completed.

Activity

Orientation: Become familiar with business procedures and policies

Date to Begin	Date Completed	Comments and Evaluation

2. Directions: In the column titled training, indicate whether the training is to be conducted on the job or in the classroom by using the scheme demonstrated. In the date column, indicate in the upper left the beginning date of the training; in the lower left, indicate the date the training is completed. Use the comments and evaluation column as you feel it is needed.

Activity

Orientation: Knowledge of training station business procedures and policies

Training		Date	Comments and Evaluation
OJT	in school	To begin Completed	

3. Upon completion of the training period, the student will be able to:

PERFORMANCE ELEMENTS	OJT	Instruction			Evaluation		
		GR	SR	YO	A	E	C
1.0 Ring sales on a cash register	X	X			A	E	(C)
2.0 Make change	X	X			A	E	(C)

CODES

GR = General Related Instruction
 SR = Specifically Related Instruction
 YO = Youth Organization

Levels of Performance Required

A = Awareness
 E = Exploratory
 C = Competent

52.

BUS 215

Tasks	Competencies	Activities	IS	OJ	Check List
Suggest related items or accessories	Coordinate merchandise with related items in an attempt to increase the amount of the sale.	Observe the sponsor applying suggestion selling and participate in a simulation problem.		X	
		Participate in role playing stressing suggestion selling	X		
	Determine customers' wants and desires during a sale.	Read the selected chapter in <u>Basic Selling</u>	X		
		Participate in role playing trying to determine the "customer's wants"	X		

161

162

LEARNING EXPERIENCES

	Competency No.	Area	LAP no.	Skill Attitude		Date		L.M.
						Begin	Comp.	
5.	823	SE	060		Handling customer complaints according to store			
					policy			
					Help customer identify and select products or			
					merchandise			

6.	COMPETENCY NUMBER AND STATEMENT	CLASSROOM			ON-THE-JOB	EVALUATION	
		SEQUENCE (YEAR AND/OR ORDER)	IND. ACT.	GROUP DIRECT-ED ACTIVITIES	TASKS PERFORMED	COORDINATOR	TRAINING DIRECTOR
53	294 - Skill in exercising self-control during trying situation	CDE I			Handling customer complaints		Competent
	143 - Skill in translating technical words covering an item of merchandise into the customer language			Project from Communication LAP 12 DECA Sales Demonstration Contest		Completed 9/25/ Very good	
BUS 215	351 - Knowledge of the procedures and factors involved in the retail and/or cost method of inventory		Math LAP 40 Tie in with map			Needs more practice for full knowledge	
	163						164

FORM VII*

COOPERATIVE RETAIL MANAGEMENT
Surry Community College
Dobson, North Carolina

Student's Weekly Report

Student _____ Week Ending _____
Course _____ Name of
Business _____
Immediate
Supervisor _____

1. What were your activities on the job this week?
2. How did you apply classroom or discussion materials?
3. What new job or procedure did you learn from your work?
4. What mistakes did you make? How did you handle the situations?
5. What problems came up on which you would like help or class discussion?

*Developed by Surry Community College, Dobson, North Carolina.

6. Give a description of the most interesting experience you had on your job.

7. What related materials did you read outside of class?

WEEKLY TIME RECORD				
Date	Time Worked		Total Hours	Comments
	From	To		
TOTAL HOURS WORKED				

This is a correct record of time worked for the week.

Signature _____

FORM VII

**SURRY
COMMUNITY COLLEGE**

**DOBSON, NORTH CAROLINA 27017
TELEPHONE 386-8121**

The student named on the enclosed evaluation sheet is enrolled in a course of "Cooperative Work Study" in our Retail Management Program here at Surry Community College.

During the winter quarter, the student has indicated employment by your business firm. Our program requires 40 hours of actual work, and your firm has been approved for this particular course and student.

Please take a few minutes to fill out the check list in order to help us evaluate the student's work. Just check the most applicable statement as it applies to the student.

A prompt return in the postage-paid, self-addressed envelope will be greatly appreciated.

Thank you for your cooperation and your contribution to the success of our program.

Sincerely,

John L Wood, Coordinator
Retail Management Program

bc

Enclosure

SURRY COMMUNITY COLLEGE
Dobson, North Carolina

Information, as checked in the spaces below, will assist the College in its appraisal of the co-operative work of:

INSTRUCTIONS: The immediate supervisor will evaluate the student objectively, comparing him with other students of comparable academic level, with other personnel assigned the same or similarly classified jobs, or with individual standards. Simply check the most appropriate level of achievement of the student.

<u>RELATIONS WITH OTHERS</u> _____ Exceptionally well accepted _____ Works well with others _____ Gets along satisfactorily _____ Has some difficulty working with others _____ Works very poorly with others	<u>ATTITUDE--APPLICATION TO WORK</u> _____ Outstanding in enthusiasm _____ Very interested and industrious _____ Average in diligence and interest _____ Somewhat indifferent _____ Definitely not interested
<u>JUDGMENT</u> _____ Exceptionally mature _____ Above average in making decisions _____ Usually makes the right decision _____ Often uses poor judgment _____ Consistently uses poor judgment	<u>DEPENDABILITY</u> _____ Completely dependable _____ Above average in dependability _____ Usually dependable _____ Sometimes neglectful or careless _____ Unreliable
<u>ABILITY TO LEARN</u> _____ Learns very quickly _____ Learns readily _____ Average in learning _____ Rather slow to learn _____ Very slow to learn	<u>QUALITY OF WORK</u> _____ Excellent _____ Very good _____ Average _____ Below average _____ Very poor
<u>ATTENDANCE</u> _____ Regular _____ Irregular	<u>PUNCTUALITY</u> _____ Regular _____ Irregular

<u> </u> Outstanding	<u> </u> Marginal
<u> </u> Very Good	<u> </u> Unsatisfactory
<u> </u> Average	

Additional Remarks (over if necessary):

Rated by: _____ (Immediate Supervisor) _____ (Title)
 _____ Date _____
 _____ (Department)

EMPLOYER'S EVALUATION OF COOPERATIVE STUDENT

Information, as checked in the spaces below, will assist in its appraisal and counseling of the cooperative student.

Name of Student _____ Date _____ Term _____ Course _____

Cooperating Employer _____

INSTRUCTIONS: The immediate supervisor will please evaluate the student objectively, comparing him with other students of comparable academic level, with other personnel assigned the same or similarly classified jobs, or with individual standards.

RELATIONS WITH OTHERS

- ☐ Exceptionally well accepted
- ☐ Works well with others
- ☐ Gets along satisfactorily
- ☐ Has some difficulty working with others
- ☐ Works very poorly with others

ATTITUDE - APPLICATION TO WORK

- ☐ Outstanding in enthusiasm
- ☐ Very interested and industrious
- ☐ Average in diligence and interest
- ☐ Somewhat indifferent
- ☐ Definitely not interested

JUDGMENT

- ☐ Exceptionally mature
- ☐ Above average in making decisions
- ☐ Usually makes the right decision
- ☐ Often uses poor judgment
- ☐ Consistently uses bad judgment

DEPENDABILITY

- ☐ Completely dependable
- ☐ Above average in dependability
- ☐ Usually dependable
- ☐ Sometimes neglectful or careless
- ☐ Unreliable

ABILITY TO LEARN

- ☐ Learns very quickly
- ☐ Learns readily
- ☐ Average in learning
- ☐ Rather slow to learn
- ☐ Very slow to learn

QUALITY OF WORK

- ☐ Excellent
- ☐ Very good
- ☐ Average
- ☐ Below average
- ☐ Very poor

ATTENDANCE: ☐ Regular ☐ Irregular

PUNCTUALITY: ☐ Regular ☐ Irregular

OVER-ALL PERFORMANCE:

Outstanding	Very Good	+ Average -	Marginal	Unsatisfactory

What traits may help or hinder the student's advancement?

Additional Remarks (over if necessary):

This report has been discussed with student ☐ Yes ☐ No

Rated by _____ Title _____ Dept. _____

Endorsed by _____ Title _____ Dept. _____

This form is recommended by the Cooperative Education Division, ASEE

REPRESENTATIVE FORM FOR MID-TERM REPORT ON TRAINING PERIOD

Please Fill In and Return

COOPERATIVE EDUCATION

Date _____
Student _____ S.S. No. _____
Date registered for job assignment _____
Date reported for training period _____
Employer _____ Department _____
Rate of Pay _____ Hours per week _____ From _____ a.m. to _____ p.m.
Curriculum Enrolled _____
Immediate supervisor is now _____ Title _____
Telephone of Supervisor _____ Your business telephone _____
Credit course taking (Course No. and Name) _____
Nature of your assignment in some detail _____

Additional comments (participation in community activities, working conditions, your feelings about your job, recreational activities):

(Use other side if more space is needed)

*Abstracted from Cooperative Occupational Education by Frank Gourley, Jr.,
North Carolina Department of Community Colleges.

FORM VIII*

REPRESENTATIVE FORM FOR TERM REPORT ON TRAINING PERIOD

COOPERATIVE EDUCATION

Please Fill In and Return

Date _____

Student _____ S.S. No. _____

Address (For next term) _____
(Street) (City) (State) (Zip)

Curriculum _____ Total Credit Hours to Date _____

Employer _____ His Address _____

Supervisor _____ Your Telephone (For Next Term) _____

Nature of Work Performed (In Detail) _____

Date Began Work _____ Date Training Period Ended _____

Rate of Pay _____ Gross Earnings for Entire Period _____

Completed Course _____ Grade _____
(Number and Name)

Completed Co-Op Seminar _____

By: Class Attendance _____ Ind. Study _____

Suggestions on how you might have a more successful experience during your next training period

On the back of the page please give us your views of your experience on the work term, its value, its weaknesses, and your community involvement or activities.

(This form to be returned to the Cooperative Occupational Education Coordinator before the first day of classes)

*Abstracted from Cooperative Occupational Education by Frank Gourley, Jr., North Carolina Department of Community Colleges.

EXAMPLE OF CO-CORDINATOR'S EMPLOYER VISIT REPORT

CO-ORDINATOR _____

STUDENT _____

IMMEDIATE SUPERVISOR _____

NAME OF BUSINESS _____

[illegible]

FORM IX*

*Abstracted from Cooperative Occupational Education by Frank Gourley, Jr., North Carolina Department of Community Colleges.

BIBLIOGRAPHY

COOPERATIVE EDUCATION*

1

Cooperative Education: Guidelines for Sections B & G of The Vocational Education Amendments of 1968. Available from State of Nebraska, Department of Education, 233 South 10 Street, Lincoln, Nebraska, 68508.

The purpose of this manual is to provide assistance to school personnel in the development and operation of a sound Cooperative Education Program, and the application of a Cooperative Education Program under Public Law 90-756.

Cooperative Education Handbook. Available from Cooperative Education Department, Beaufort County Technical Institute, P. O. Box 1069, Washington, North Carolina, 27889.

A booklet aimed primarily at informing the student about cooperative education and the responsibilities of the student in the program. The booklet also serves as continuing guide to students, employers and the college in their efforts to achieve the objectives of cooperative education.

Gourley, Jr., Frank A. Cooperative Occupational Education. Available from Program Development Division, Department of Community Colleges, Raleigh, North Carolina, 27611, Revised, Winter, 1976. No charge.

The purpose of this manual is to provide information to community colleges and technical institutes interested in operating cooperative education programs. General information is provided as well as typical forms used for the administration of the program. Selected resources are listed for obtaining additional information.

Policies and Standards for Cooperative Vocational Education. Available from Division of Occupational Education, State Department of Public Instruction, Raleigh, North Carolina, 27611. (February, 1971 or Current Edition.)

This bulletin provides the standards pertaining to Cooperative Vocational Education based on policies adopted by the State Board of Education and constitutes the official position of that Board. As such, these policies and standards will be followed by all persons involved in cooperative education.

Technical Institute of Alamance: Cooperative Education Handbook. Available from Technical Institute of Alamance, P. O. Box 623, Haw River, North Carolina, 27258.

This handbook is provided as an aid to the student for successful participation in the Cooperative Education Program.

Program Specialist. Cooperative Education and Work Study Programs,
Division of Vocational and Technical Education, U.S. Office of
Education, Washington, DC, 20202.

Specific publications on Cooperative Vocational Education to
request include:

1. "Zero in on Cooperative Vocational Education Training Agreements"
is a publication designed to encourage states to give further
attention to the development of training agreements.
2. "The Conference Report on Cooperative Vocational Education" is a
review of the national conference held in Washington, DC, April,
1973.
3. "Notes and Working Papers From The National Conference on Coopera-
tive Vocational Education: Implications of the 1968 Amendments"
is a review of the national conference conducted by the University
of Michigan, February, 1969.

*A more extensive list of selected resources is available from the Program
Development Division, Department of Community Colleges, Raleigh, North
Carolina, 27611: Cooperative Occupational Education by Frank A. Gourly,
Jr., pages 15-16.

APPENDIX B

LABOR LAWS

Fair Labor Standards Act of 1938, As Amended. (Available through local congressional representative.) U.S. Department of Labor, Publication 1318, Printed October, 1975 or most recent printing. Employment Standards Administration, Wage and Hour Division.

The following state publications available from:

North Carolina Department of Labor
State Employment Standards Division
P. O. Box 27407
Raleigh, NC 27611

1. Child Labor Law (G.S. 110 - Article 1)
2. Maximum Hour Law (G.S. 95-15 - 95-25)
3. Minimum Wage Law (G.S. 95-85 - 95-96)
4. Uniform Wage Payment Law (G.S. 95 - Article 17)
5. Leaflet on State Labor Laws (Condensed from Laws)

APPENDIX C

SIMULATION

Ideally, the cooperative education program should provide students with exposure to and experience in the "real" world. However, when it is difficult or impossible to send the student to the job, bring the job to the student - through simulation. Simulation has been defined as a concentrated learning experience or exercise specifically designed to represent important real-life activities by providing the learner(s) with the essential elements of the real situation. Simulation appears to be as good as traditional teaching, is motivational and is very good in developing attitudes.

The advantages of simulation are:

1. bridge the gap between theory and practice.
2. develop skills and knowledges in surroundings similar to on-the-job situation.
3. motivation.
4. continuous learning.
5. feel for the work environment.
6. become active participant.
7. cooperation.
8. affective development - attitude.
9. time compression.
10. cost effectiveness.
11. unobtrusive evaluation - can observe what is being done on the job.
12. more efficient productivity.

The limitations of simulation are:

1. number of students may not be conducive to class.
2. time for planning is needed.
3. how much time for simulation.
4. complex system (must be real-life situation).
5. facilities.
6. supplies (budgets and paper shortage).
7. evaluation.

Variations of simulation include:

1. Model office or business - The classroom or course is modeled exactly like the environment for an office or business.
2. Practice sets - A form of simulation but more individualized.
3. Task simulations - Behavioral aspects and tasks of a job are identified.
4. Intensive office or business laboratory - A block-time course in which students do work of local business or industry or work activity packages developed with assistance from business representatives.

The intensive laboratory has three divisions.

- a. Productive work station - Processes used in producing finished product.
- b. Project work station - Task simulation used to develop skills and decision-making techniques.
- c. Functional work station - Combination of total class - supplies, inventory, receptionist, etc.

One procedure for implementing simulation is:

1. Review - Give tasks - Do tasks individually - Evaluate - Simulated activity - Group instruction.
2. Teach - Review - Integrated exercise - Employment-based project, typical of business world and to emphasize what is taught.

business or office situation.

4. Review or teach - Model business or classroom situation - Students apply for positions - Students work part-time in business and part-time in classroom.

No matter which method you use in designing a simulation program, the materials must be realistic, relevant and meaningful for students at every ability level. Instruction packets or materials should be designed so that they could be used by instructors; no matter what type of program, facilities or equipment were available. Format designs, guidelines and a bibliography for use in developing simulation are shown on the following pages.

THE SIMULATED OFFICE

External Signs

Equipment

Supplies

Input

Office Manual

Work Flow Chart

Room Arrangement

Internal Signs

Supervisor/Worker Relationships

Work Flow

Interrelated Positions

Distribution of Work

Decision-Making Points

Production Standards

Quality Standards

Cooperative Spirit

Output Controls

Accountability

Coping with Problems and People

FORMAT DESIGN FOR EMPLOYEE KIT

1. Company Manual provides a brief overview of the business, organization chart, lay-out drawings of business and personnel practices.
2. Procedures Manual (reference manual) provides business procedures. A reference booklet which details instructions, illustrates form-examples and lists addresses and terminology pertinent to that particular type of business.
3. Daily work projects are presented in a logical step-by-step task breakdown. The employee must make decisions, determine priorities, procure needed supplies and perform the task as instructed - using the reference manual as a guide.

FORMAT DESIGN FOR INSTRUCTOR/SUPERVISOR KIT

1. Summary sheet listing individual project requirements, such as equipment utilized; or preparation and duties instructor should conduct prior to time employee begins work on a specific project.
2. Project keys
3. Master form copies of each item needed in the projects.
4. Contingency projects. Tasks not used in employee kits but tasks to be used as "rush" or emergency work activities. Instructor-supervisor inputs these activities according to needs and abilities of each employee.

GUIDELINES FOR DEVELOPMENT OF RELATED INSTRUCTION PROJECTS

As the coordinator builds each project (or plans them with the student), these ten guidelines should be followed:

1. State performance objectives.
2. Design activities to meet the objectives.
3. Select activities that are job based.
4. Stress "learning by doing" activities.
5. Provide a wide variety of activities.
6. Provide some options from which the student may choose.
7. Build in checkpoints to determine progress.
8. Build in involvement with the job supervisor.
9. Use career-oriented resources and references.
10. Build in evaluation techniques, especially pretests and posttests.

FORMAT FOR RELATED INSTRUCTION PROJECTS

1. Title sheet
2. Statement of concept(s)
3. Performance objectives
4. Pretest
5. Lessons
6. Quest opportunities
7. Evaluation
8. Teacher instructions

The student's version of the Related Instruction Project may contain the first seven parts (or may not include the tests) while the teacher's version contains all eight parts.

APPENDIX D

SECRETARIAL/GENERAL OFFICE INTERNSHIP*

A. COURSE OBJECTIVES

1. To provide a realistic environment in career area--The student has developed skills and accumulated related knowledge within the confines of the classroom for the past six (6) quarters of study. To provide the realism needed for full understanding and appreciation, the student is given the opportunity in this course to apply these accumulated learnings and skills. This is accomplished by having the student work as an office employee on a part-time basis in a local business office. No other environment could better finalize employment preparation.
2. To provide greater opportunity to explore skills--The application of skills learned will bring meaning and purpose to this area of responsibility.
3. To provide personal growth enhancement--This probably is the most important objective of the internship program. Personal growth is difficult, if not impossible, to teach in the classroom. At the same time, more office employees are released from employment because of some personality deficiency than for any other reason.

Through the internship program, the student is given an opportunity to grow personally as needed for success in the business office. Only by being a part of the office environment can this growth take place and begin to mature.

B. RECOMMENDED TEXT MATERIALS

1. Your Attitude is Showing, Current Edition, Elwood N. Chapman, Science Research Associates, Inc.

Note: Skills and related knowledge development for the past six (6) quarters has led us to this point.

This particular area of study was purposely chosen for use during the Friday afternoon seminars. During the quarter that the student is interning, a genuine relationship can be viewed between her office personality experiences and the content of this text concerning proper office personality traits. Only through living the part can personality be properly studied and improved.

*Developed by Jenell N. Hebert, Business Instructor, Blue Ridge Technical Institute.

C. Breakdown of Portions of the Textbook to be Covered

- Chapter 1 - You Can't Escape Human Relations
- Chapter 2 - Human Relations Can Make or Break You
- Chapter 3 - Hold on to Your Positive Attitude
- Chapter 4 - Vertical and Horizontal Working Relationships
- Chapter 5 - Productivity and Good Human Relations
- Chapter 6 - Success: Combining Productivity and Human Relations
- Chapter 7 - Your Most Important Working Relationship
- Chapter 8 - Relationship Overtones
- Chapter 9 - How to Compensate for Youth and Inexperience
- Chapter 10- Thirteen Tips on Succeeding in a New Job or Assignment
- Chapter 11- The First Weeks are Critical
- Chapter 12- How to Handle Teasing and Testing
- Chapter 13- The High Price of Absenteeism
- Chapter 14- Three Common Human Relations Mistakes
- Chapter 15- Beware of the Rumor Mill
- Chapter 16- PFW Can Mean Opportunity
- Chapter 17- Wear Your Patience Suit
- Chapter 18- Release Your Frustrations Harmlessly
- Chapter 19- Meet Joe Harvey Again
- Chapter 20- When Other Pastures Look Greener

Note: There are case studies at the end of each chapter to analyze and discuss which will make the chapter material more meaningful (as well as possible personal tie-ins as a result of internship environment.)

Since the seminar is only one day a week, Friday afternoon for three (3) hours, for (4) chapters per session will be covered, resulting in completion over a four (4) week period of study.

D. ADDITIONAL MATERIALS NEEDED BY STUDENTS

1. Notetaking supplies
2. Typewriting supplies
3. Reference Manual for Office Personnel, Current Edition, House & Koebele, South-Western Publishing Co.
(or similar reference manual)
4. Word-Division Manual

E. GRADING PROCEDURE AND ATTENDANCE POLICY

1. Letter Grade will be determined according to the following scale:

93 - 100		A
86 - 92		B
78 - 85		C
70 - 77		D
below 70		F

2. Numerical Score will be determined in the following manner:

Written Evaluation by Employer	75 percent
Seminar Participation.	
Weekly & Comprehensive Reports	25 percent
Grades on Assignments.	

F. ATTENDANCE POLICY

The student will be dropped from the course after accumulating five (5) consecutive absences. It must be understood that attendance in the business office is subject to this policy as well as the Friday afternoon seminar. The business office is considered the student's classroom each Monday thru Thursday.

The student will be held responsible for work missed in the seminar because of absence.

G. LIST OF REFERENCES FOR STUDENT'S USE

The Secretary (magazine in library)

The Office (magazine in library)

Personal Report for the Professional Secretary (brochures in library)

H. LIST OF REFERENCES FOR INSTRUCTOR (Personal Library)

Business Education Forum
Business Education World
The Journal of Business Education
Today's Secretary
The Secretary
The Office
Balance Sheet

I. LIST OF AUDIO-VISUAL EQUIPMENT NEEDED TO FULFILL OBJECTIVES

1. Overhead projector
2. Filmstrips and projector
3. Tape Recorder

J. SEMINAR ACTIVITIES OTHER THAN TEXT COVERAGE

- | | |
|---------------------|--|
| Weekly | A. Oral reports from interns on past week's work experience |
| Weekly | B. Interns type weekly report to be submitted to instructor |
| Two (2)
Sessions | C. "In-Basket" study cases |
| Two (2)
Sessions | D. Guest Speakers (post graduate, secretarial, and personnel manager) |
| One (1)
Session | E. ABWA (American Business Women's Association) representative to give talk on professional organization |
| One (1)
Session | F. Visit IBM (ASHEVILLE office) to view latest equipment |
| Last
Week | G. Instruction on IBM Memory Typewriter |
| Last
Week | H. Conference with individual interns on evaluation from employer |

K. GENERAL INFORMATION CONCERNING INTERNSHIP PROGRAM

The internship program is offered spring quarter to all executive secretarial and general office students who have successfully completed all requirements for the previous six (6) quarters of study as listed in the general catalog. This, in effect, is the final preparation for employment in which the student pulls together her skills and related knowledge into a working situation within a local business office.

The student is required to work 12 hours per week, Monday through Thursday, in a local business office. On Friday, the student reports to a seminar session, a three (3) hour period and does not report to the office.

The total time involved in the student working in the business office is ten (10) weeks. The quarter consists of eleven (11) weeks--the final week of the quarter is spent in seminar.

The student does not receive wages for her work in the business office. The program is wholly a learning experience; whereas, the office is the classroom.

L. OUTLINE OF PREPARATIONS FOR INTERNSHIP (Winter Quarter)

1. Meet with the prospective interns--mid quarter

At this meeting, the internship program in general is discussed with the students.

The students are shown a copy of the letter and questionnaire which is sent to a random sample of the local businesses explaining the internship program and asking for possible interest in participating. The questionnaire is returned to the internship coordinator by the business in the enclosed stamped, self-addressed envelope.

The students fill out "Schedule A" and return it to the coordinator. As a result of the information given on this form, the intern will be placed accordingly, if possible.

The students are instructed to type several original copies of her "Personal Data Sheet" plus a carbon to be retained by the instructor. Each time the student interviews for a job, she should take original copy of her data sheet plus a copy of her Blue Ridge Tech transcript, which the coordinator will obtain from the Registrar and retain for the students to be used as needed for interview purposes.

2. Upon receipt of the positively answered questionnaires, the coordinator contacts the business and arranges an appointment to visit the designated individual within the business to further discuss the program and inquire as to the responsibilities the intern will be given.

3. Next, the coordinator determines which students best qualify and desire this type work and contact them. The students are given the responsibility of calling the business to set a time and date for the interview. When the job is offered to a student, she must reply in writing. The student may not refuse the position offered her.

M. INTERNSHIP PROGRAM (Spring Quarter)

1. The first day of spring quarter, is best for students to meet on campus with the coordinator to finalize all plans and be sure of all last-minute preparations, questions, etc.
2. At this time, the students fill out "Schedule B" and turn in to the coordinator. This information is kept on file by the coordinator with "Schedule A" and the carbon copy data sheets.

The students are shown a copy of the "Evaluation Form" which will be used by the employer at the end of the quarter for grading purposes. This is felt to be a courtesy to the student--an opportunity to view the expectations.

2. The coordinator visits the interns in their working environment and also visits the employers during the quarter.
3. As discussed earlier, the interns meet each Friday for a three (3) hour seminar session. In addition to the planned activities for the seminar as listed under "Section J," this is the time to correct any job related deficiencies.
4. The last week of the quarter, the interns meet in seminar every day and the work experience is ended. The coordinator, towards the end of the quarter, delivers to each employer, a copy of the "Evaluation Form" and discusses the areas covered within it. The form is left with the employer and collected at a later date. During the last week, the coordinator should, by means of individual conferences held privately, show and discuss the "Evaluation Form" with the students.
5. The coordinator, as a finishing touch, should write to each employer expressing appreciation for participation and hopes for future participation.

N. RESPONSIBILITIES OF INTERNSHIP COORDINATOR (Summarized)

1. Correspond in writing with different types of businesses to determine interest in internship program.
2. Upon receipt of "positive response" questionnaires, telephone business to make appointment to visit and discuss further the internship program.
3. Meanwhile, have first meeting with interns to discuss program particulars plus the following:
 - a. Fill out Schedule A
 - b. Have interns prepare several original data sheets for presentation to interviewers, plus one carbon for coordinator's use.

4. Have students call businesses themselves to set up appointment for interview, unless otherwise requested by business.
5. Follow-up on interviews.
6. Have students, as positions are accepted, acknowledge acceptance by letter to business.
7. Make list of interns and assigned jobs to present to Business Chairperson and Dean of Instruction.
8. Prepare course handout sheet for students.
9. Gather and organize materials to be used in Friday seminar sessions.



BLUE RIDGE TECHNICAL INSTITUTE

DR. WILLIAM D. KILLIAN
PRESIDENT

ROUTE 2

FLAT ROCK, NORTH CAROLINA 28731

TELEPHONE 704/692-3572

February 2, 1976

SECRETARIAL AND GENERAL OFFICE INTERNSHIP BLUE RIDGE TECHNICAL INSTITUTE

For the third year, may we offer you added office assistance in your business? At the same time, our senior secretarial and general office technology students will be able to complete their career preparations through on-the-job experiences.

We are now making plans for our secretarial internship program, spring quarter, 1976 (beginning March 29 and ending June 4). In this program, we place students on the job in local offices for a minimum of 12 hours per week, Monday - Thursday. This is their last quarter of study prior to graduation; five quarter hour credits are received from this work which is closely supervised by myself.

The student's campus work schedule will be arranged to be completed during the morning hours. This allows the business to utilize the services of the student during the afternoon hours each day, Monday - Thursday.

Enclosed you will find a questionnaire and a stamped self-addressed envelope. Please answer the questions on the questionnaire and return to me in the envelope that is provided. We feel this is an opportunity for you and the intern. Thank you for your cooperation.

Jenell N. Hebert

MRS. JENELL N. HEBERT, COORDINATOR
SENIOR SECRETARIAL INTERNSHIP PROGRAM

kg

Enclosures 2

P.S. As a result of a recent state board ruling, the interns may not receive wages for services rendered to the business. The program is to be wholly for educational purposes.

Blue Ridge Technical Institute
Secretarial Internship Program
Prospective Employer Questionnaire

1. Would you be interested in having a senior student secretary work in your office?

Yes _____ No _____

2. If so, how many? _____

3. Would you require shorthand?

Yes _____ No _____

4. Would you require accounting skills?

Yes _____ No _____

5. Would you agree to have them work for you a minimum of 12 hours per week for approximately 10 weeks?

Yes _____ No _____

6. Would you agree to having a conference with the coordinator for evaluation purposes?

Yes _____ No _____

7. Who should we contact when it is time to place an intern in your office?

Firm's Name:

Address:

Telephone:

Schedule A
SECRETARIAL INTERNSHIP

Jenell Hebert, Instructor

Name of Student _____

Address _____

Telephone _____

Are you now working in an office? _____

If so, where? _____

How many hours per week? _____

What are the hours? _____

What type of job would you prefer for your secretarial internship?

Do you have any preference as to what business or organization you
might want to work for? _____

Any other comments:

Schedule B
SECRETARIAL INTERNSHIP

Jenell Hebert, Instructor

Name _____

Address _____

Home Telephone Number _____

Place of Employment: _____

Name of Immediate Supervisor _____

Address _____

Business Telephone _____

Duties:

Hours _____

PLEASE READ THE FOLLOWING CAREFULLY--THEY ARE MOST IMPORTANT!!!!

1. If you must be absent from work, it is IMPERATIVE that you call your employer--and that you notify Mrs. Hebert (692-3572).
2. If you lose your job, or quit your job, it is your responsibility to find another one to complete your internship.
3. Discuss any problems you may have on the job with Mrs. Hebert. She will be working closely with both you and your employer.

Your signature, indicating you have read the above, understand it, and will abide by it:

BLUE RIDGE TECHNICAL INSTITUTE
Jenell Hebert, Coordinator
Phone 692 - 3572

STUDENT RATING FORM

STUDENT'S NAME: _____

FIRM NAME: _____

DATES OF FIRM EMPLOYMENT (from-to): _____

STUDENT'S WORK ASSIGNMENTS: _____

Department: _____

Job Title: _____

Duties: _____

Directions: Please rate by checking the appropriate column.

PROFESSIONAL QUALIFICATIONS

1. Promptness and regularity of attendance
2. Thoroughness in following instructions
3. Quickness in learning departmental policies and procedures
4. Ability to relate job assignments to departmental and total firm goals
5. Ability to perform under pressure

Superior	Good	Satisfactory	Poor	Unable to Rate

HUMAN RELATIONSHIPS

1. Ability to accept constructive criticism
2. Open-mindedness (willingness to listen and learn)
3. Relationships with others:
Co-workers
Supervisors
Those supervised
4. Ability to inspire enthusiasm and loyalty to others

INITIATIVE

1. Resourcefulness in discharging responsibilities
2. Acceptance of responsibilities beyond those specifically delegated.

Superior	Good	Satisfactory	Poor	Unable to Rate

DEPENDABILITY

1. Ability to make decisions without undue delay
2. Quality of judgments
3. Capacity to carry out work assignments:
From a quality standpoint
From a quantity standpoint
4. Accuracy

COMMUNICATION

1. Ability to state ideas clearly and effectively to others
2. Ability in written self-expression

APPEARANCE

1. Neatness and personal grooming habits
2. Poise
3. Personal taste

MATURITY:

Did this student appear mature enough to handle situations generally confronting secretaries in your organization?

Yes _____ No _____ Possibly _____

Comments:

APTITUDE FOR OFFICE WORK:

Do you think this student will be able to develop into a successful Office Worker?

Yes _____ No _____ Possibly _____

Comments:

STUDENT'S STRONG POINTS (please list and describe)

STUDENT'S CHIEF WEAKNESSES (please list and describe)

We would appreciate having any additional comments you might care to make with regard to this student, pertaining to: (1) developments throughout the work period; (2) any significant attitudes or performances during the period; (3) your suggestions regarding possible improvements or development needed.

Signature of rater: _____

Title or position: _____

Date: _____

Instructor: Mrs. Jenell Hebert

SECRETARIAL INTERNSHIP

I. Textbook and Materials Needed

- A. Your Attitude Is Showing, Second Edition, Elwood N. Chapman, Science Research Associates, Inc.
- B. Notetaking supplies
- C. Typewriting supplies
- D. Reference Manual For Office Personnel 5th Edition, House & Koebele, South-Western Publishing Co.
(or similar reference manual)
- E. Word Division Manual

II. Objectives of Course

- A. To provide a realistic environment in career area
- B. To provide greater opportunity to explore skills
- C. To provide personal growth enhancement

III. Grading Procedure

Written Evaluation by Employer	75%	93 - 100	A
		86 - 92	B
Seminar Participation		78 - 85	C
Weekly & Comprehensive Reports	25%	70 - 77	D
Grades on Assignments		below 70	F

IV. Absences

The student will be dropped from the course after accumulating five (5) consecutive absences.

The student will be held responsible for work missed because of absence from class.

V. ReferencesThe SecretaryThe OfficePersonal Report for the Professional Secretary

VI. Seminar Activities Other Than Text Coverage

- | | |
|---------------------|--|
| Weekly | A. Oral reports from interns on past week's work experiences |
| Weekly | B. Interns type weekly report to be submitted to instructor |
| Two (2)
Sessions | C. "In-Basket" study cases |
| Two (2)
Sessions | D. Guest Speakers (past secretarial graduate and personnel director) |
| One (1)
Session | E. ABWA (American Business Women's Association) representative to give talk on professional organization |
| One (1)
Session | F. Visit IBM (Asheville office) to view latest equipment |
| Last
Week | G. Instruction on IBM Memory Typewriter |
| Last
Week | H. Conferences with individual interns on evaluation from employer |

SYLLABUS FOR
OFFICE MACHINES I
BUS 110

This syllabus was developed by Lyn Durham, Business Department Head, Randolph Technical Institute; Max Hutchins, Secretarial Science Department Head, Asheville-Buncombe Technical Institute; with assistance from Dr. Jim Cates, formerly a Business Instructor, at Western Piedmont Community College, currently employed as a sales representative with Pitney-Bowes. Members of the Secretarial Science Advisory and Curriculum Committees and business departments in the North Carolina community colleges/technical institutes provided assistance and information.

Appreciation is expressed to Mrs. Durham, Mr. Hutchins and Dr. Cates, to their respective institutions and to the committees and business departments for their cooperation and assistance in developing and reviewing this syllabus.

BUSINESS 110
OFFICE MACHINES

I. DESCRIPTION OF COURSE:

The student will be introduced to the machines currently being used in business and industry. The student will receive training in the basic principles, operating procedures, and business applications of machines such as the ten-key adding machine, the electronic calculator (printing and display), the printing calculator, and the full keyboard adding machine. Primary emphasis is on mastery of the touch system for all ten-key machines, with extensive coverage of electronic calculators.

II. COURSE OBJECTIVES:

Following completion of this course, the student will

- A. Demonstrate proficiency in the touch system for all types of ten-key machines (minimum of 125 strokes per minute)
- B. Demonstrate competence in the operational procedures of the various office machines with the speed and accuracy needed for an "entry-level" position
- C. Demonstrate the ability to apply basic mathematical principles in solving business problems
- D. Demonstrate a high level of production efficiency through correct position and work habits
- E. Demonstrate familiarity in the care of office machines and in the use of machine instructional manuals

III. MAJOR DIVISIONS OF COURSE CONTENT:

Independent units of instruction on:

- A. Ten-key adding machine
- B. Electronic calculator (printing and/or display)
- C. Printing calculator
- D. Full-keyboard adding machine

IV. CREDITS, HOURS, PREREQUISITES:

- A. Three (3) quarter hours credit
- B. One-two (1-2) class hours per week; two-four (2-4) laboratory hours per week
- C. No prerequisite

V. EVALUATION:

Evaluation is based on the completion of stated objectives and should include achievement tests for each of the office machines and a touch-method test on the ten-key machine. (Madaus and Yrle's stroking test and standards is recommended.)

INTRODUCTION

The development of a large variety of electronic calculating machines has increased the need and demand for proficient machine operators. A functional mastery of the ten-keyboard is necessary as the new electronic machines have adopted this keyboard.

Although the types of office machines vary from institution to institution, we feel that each institution should attempt to update their equipment in order to develop competent machine operators who will qualify for initial employment as well as higher level positions.

In preparing this outline to be used as a guide, we have included the ten-key adding machine, the electronic calculator (printing and/or display), the electromagnetic printing calculator, and the full-keyboard adding machine. The outline is not intended to be inclusive because we feel that instructors should add or substitute those business machines which are available and which meet the vocational requirements of their community. The course outline for the electronic calculator is somewhat more complete than the other sections of the outline.

We would urge that all instructors place emphasis on the development by the student of a proficient ten-key touch system. A good stroking test is by Dr. Herbert S. Madaus and Mrs. Augusta C. Yrle, "Developing Proficiency in Ten-Key Touch Operation," Business Education Forum 30, No. 7 (April 1976); 10-11.

We would hope that the training received in every office machine course would enable the student to develop a high degree of proficiency of operation and problem-solving ability through the use of actual business forms to provide experience in handling a variety of business applications:

I. Ten-Key Adding Machine

A. Functional use of the machine

B. Operational keys

1. Clear key
2. Subtotal key
3. Total key
4. Non-add key
5. Repeat key
6. Special keys

Textbook diagrams
Operational manuals
Audiovisual materials

C. Care of the machine

1. Ribbon change
2. Paper-roll change
3. Cover when not in use

D. Position and work habits

1. Correct position: machine
textbook
operator
2. Reading figures and recording
answers quickly, accurately,
legibly, and decimally correct
3. Neat work area

Read entire amount as one
unit rather than digit
by digit

Keep pencil in hand while
operating the machine

E. The touch system

1. Correct fingering and hand position
2. Home-row keys
3. Reaches to other keys
4. Short, quick, rhythmic stroke

Left-handed operators:
ring finger for the 4
middle finger for the 5
index finger for the 6
thumb for the add bar
either little finger or
thumb for the zero

F. Mathematical operations

1. Addition

- a. Touch operation
- b. Decimals and whole numbers
- c. Varying decimal places
- d. Repeated numbers
- e. Sub-totals
- f. Fractions
- g. Horizontal and vertical addition

CONTENT OUTLINE

NOTES

2. Subtraction

- a. Touch operation
- b. Credit balances
- c. Positive and negative amounts
- d. Repeated numbers
- e. Decimals and fractions

3. Multiplication

- a. Touch operation
- b. Repeat addition
- c. Shortcut multiplication
- d. Whole numbers and decimals
- e. Percentages and discounts

4. Division

- a. Reciprocal method
- b. Decimal numbers

G. Problems and business applications

Deposit Tickets
Balance Sheets
Checkbook Records
Bank Statements
Sales Analysis Reports
Sales Invoices
Payroll Reports

H. Achievement test

II. Electronic Calculator (printing and/or display)

A. Functional use and significance

B. Special features

- 1. Add-mode decimal position
- 2. Automatic retention of last number
- 3. Floating decimal input
- 4. Fixed decimal output
- 5. Automatic round-off
- 6. Automatic accumulation
- 7. Automatic retention of constant
- 8. Memories
- 9. Clear keys
- 10. Percent key
- 11. Exchange or reverse key

Textbook diagrams
Operational manuals
Audiovisual materials

C. Operational keys

1. Clear keys: keyboard and memory registers
2. Add key
3. Minus key
4. Non-add key (tape calculators only)
5. Decimal point key
6. Multiplication key
7. Division key
8. Subtotal key
9. Total/Equals key
10. Memory plus key
11. Memory minus key
12. Memory recall key
13. Paper advance key
14. Other "special feature" keys

The basic principle of electronic calculator operation is "talk the problem into the machine and depress the appropriate key"

The basic organization of function keys facilitates distinguishing the
(1) adding machine unit
(2) calculating unit
(3) additional calculating registers

D. Care of the machine

1. On/Off switch
2. Cover when not in use
3. Ribbon change (tape calculators only)
4. Paper-roll change

Use paper advance key to avoid damage to machine

E. Position and work habits

1. Correct position: machine
textbook
operator
2. Keyboarding and recording answers quickly, accurately, legibly, and decimally correct
3. Neat work area

F. The touch system

1. Correct fingering and hand position
2. Home-row keys
3. Reaches to other keys
4. Short, quick, rhythmic stroke

G. Basic mathematical operations

1. Addition
 - a. Touch operation
 - b. Varying decimal locations

CONTENT OUTLINE

NOTES

- c. Subtotals
- d. Repeated numbers
- e. Fractions
- f. Horizontal and vertical addition

2. Subtraction

- a. Touch operation
- b. Credit balances
- c. Positive and negative amounts
- d. Repeated numbers
- e. Decimals and fractions

3. Multiplication

- a. Touch operation
- b. Whole numbers and decimals
- c. Unrounded products
- d. Rounded-off products
- e. Constant multiplication
- f. Accumulative multiplication
- g. Multifactor multiplication
- h. Fractions

4. Division

- a. Touch operation
- b. Whole numbers and decimals
- c. Unrounded quotients
- d. Rounded quotients
- e. Constant divisor
- f. Constant dividend
- g. Accumulation of quotients

H. Sequential arithmetic calculations

- a. Mixed operations
- b. Discounts and net amounts
- c. Percentage applications
- d. Proration
- e. Simple and compound interest
- f. Merchandising calculations:
 selling price, cost and
 markup

I. Problems and business applications

J. Achievement test

Payroll Reports
Sales Invoices
Employer's Quarterly Tax
 Reports
Monthly Sales Comparative
 Reports

III. Printing Calculator

A. Functional use

B. Operational keys

1. Clear key
2. Subtotal key
3. Total key
4. Non-add key
5. Repeat key
6. Multiplication key
7. Division key
8. Other "special feature" keys

Textbook diagrams
Operational manuals
Audiovisual materials

C. Care of the machine

1. Ribbon change
2. Paper-roll change
3. Cover when not in use

D. Position: machine textbook operator

E. Work habits

1. Reading figures and recording answers quickly, accurately, legibly, and decimally correct
2. Neat work area

F. Mathematical operations

1. Addition

- a. Touch operation
- b. Whole numbers and decimals
- c. Varying decimal places
- d. Subtotals
- e. Repeated numbers
- f. Fractions
- g. Horizontal and vertical addition

2. Subtraction

- a. Touch operation
- b. Credit balances

CONTENT OUTLINE

NOTES

- c. Positive and negative amounts
- d. Repeated numbers
- e. Fractions

3. Multiplication

- a. Whole numbers and decimals
- b. Constant multiplication
- c. Accumulative multiplication
- d. Multifactor multiplication
- e. Fractions and percents

4. Division

- a. Whole numbers
- b. Decimals in dividends and divisors
- c. Amount and percent of increase and decrease

G. Problems and business applications

Invoices
Payroll Reports
Sales Performance Record

H. Achievement test

IV. Full Keyboard Adding Machine

A. Functional use

B. Operational keys

- 1. Clear key
- 2. Subtotal key
- 3. Total key
- 4. Non-add key
- 5. Repeat key

Textbook diagrams
Operational manuals
Audiovisual materials

C. Care of the machine

- 1. Ribbon change
- 2. Paper-roll change
- 3. Cover when not in use

D. Position and work habits

- 1. Correct position: machine
textbook
operator

- 2. Reading figures and recording answers quickly, accurately, legibly, and decimally correct
- 3. Neat work area

E. Mathematical operations

1. Addition

- a. Fingering techniques and drills
- b. Repeated numbers
- c. Subtotals
- d. Horizontal and vertical addition

2. Subtraction

- a. Debit and credit balances
- b. Positive and negative addition

3. Multiplication

- a. Repeat addition
- b. Shortcut multiplication
- c. Whole numbers and decimals

4. Division

- a. Reciprocal method
- b. Decimals

F. Problems and business applications

Checkbook Records
Balance Sheets

G. Achievement test

V. Optional Instructional Units for Office Machines Course

- A. Basic mathematics review
- B. Programmable electronic calculators
- C. The International System of Units (SI)

- 1. Metric weight, length, and area
- 2. Metric conversions
- 3. The Celsius thermometer

BIBLIOGRAPHY

I. Books

A. Suggested Texts

Briggs, Robert and Eugene Kosy. Office Machines: A Collegiate Course. Cincinnati: South-Western Publishing Co., Current Edition.

Giordana, Al. Basic Business Machine Calculation. Englewood Cliffs, N. J.: Prentice-Hall Publishing Company, Current Edition.

Kinsey, Vera G. Mastering Business Machines. New York: Harcourt Brace Jovanovich, Inc., Current Edition.

Warner, Joan Elizabeth. Business Calculator Operations. Reston, Virginia: Reston Publishing Company, Inc., Current Edition.

B. Other References

Agnew, Peter L. and William R. Pasewark. Full-Keyboard Adding-Listing Machine Course. Cincinnati: South-Western Publishing Co.,

Andrews, Frances K. Office Machines. Raleigh: North Carolina Department of Community Colleges, 1972.

Carter, Juanita and D. Young. Calculating Machines, A Ten-Key Approach. Atlanta: Houghton Mifflin, Current Edition.

Cornelia, Nicholas and others. Office Machines Course. Cincinnati: South-Western Publishing Co., Current Edition.

Fasnacht, Harold D. How to Use Office Machines. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.

Kallaus, Norman, and James Clark. College Business Machines. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.

Locke, Flora M. and Dorothy Dehr. Office Calculating and Adding Machines. New York: Wilby Publishing Company, Current Edition.

Pasewark, William R. and Nicholas Cornelia. Ten Key Adding-Listing Machine. Cincinnati: South-Western Publishing Co., Current Edition.

Pasewark, William R. Electronic Display Calculator Course. Cincinnati: South-Western Publishing Co., Current Edition.

Pasewark, William R. Electronic and Mechanical Printing Calculator Course. Cincinnati: South-Western Publishing Co., Current Edition.

Romen, Kenneth A. A Laboratory Manual in Business Machines.
Dubuque, Iowa: W. C. Brown, Current Edition.

Wilcox, Glade W. and Charles H. Butler. Industrial Calculating
Devices. New York: Holt, Rinehart and Winston, Current Edition.

II. Enrichment Materials

Cornelia, Nicholas J. and Peter L. Agnew. Machine Office Practice
(Practice Set). Cincinnati: South-Western Publishing Co., Current
Edition.

Dool, J. H. Business Machine Exercises. New York: Gregg Division,
McGraw-Hill Book Company, Current Edition.

Munns, Virginia. Business Machine Job Problems. Englewood Cliffs,
N. J.: Prentice-Hall Publishing Company, Current Edition.

III. Tapes and Filmstrips

Business Calculating Machines (Slide/Tapes). Morristown, N. J.:
Media Supply Company.

EDL Ten-Key Touch Training Course. New York: Gregg Division,
McGraw-Hill Book Company.

Hempel, Marvin W. and others. Business Machines (ERA). Mountain
View, California: Western Tape.

IV. Periodicals

Balance Sheet
Business Education Forum
Business Education World
Journal of Business Education
Modern Office Procedures
The Secretary
The Office

Hotline. National Office Machine Dealers Association, 1510 Jarvis
Avenue, Elk Grove Village, IL, 60007 (Semiannually newsletter).

Office Products. Hitchcock Publishing Company, Hitchcock Building,
Wheaton, IL, 60187 (Monthly: \$10 per year).

Office Products Industry Report. National Office Products
Association, 1500 Wilson Boulevard, Arlington, VA, 22209
(Bimonthly newsletter).

B. Associations

Computer and Business Equipment Manufacturers Association, 1828 L Street, Northwest, Washington, DC, 20036.

National Office Machine Dealers Association, 1510 Jarvis Avenue, Elk Grove Village, IL, 60007.

National Office Products Association, 1500 Wilson Boulevard, Arlington, VA, 22209.

APPENDIX

Rotating Schedule For Office Machines

Student	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10
No. 1	Mach 1	Mach 2	Mach 3	Mach 4	Mach 5	Mach 6	Mach 7	Mach 8	Mach 9	Mach 10
No. 2	Mach 11	Mach 12	Mach 13	Mach 14	Mach 15	Mach 16	Mach 17	Mach 18	Mach 19	Mach 20
No. 3	Mach 2	Mach 3	Mach 4	Mach 5	Mach 6	Mach 7	Mach 8	Mach 9	Mach 10	Mach 1
No. 4	Mach 12	Mach 13	Mach 14	Mach 15	Mach 16	Mach 17	Mach 18	Mach 19	Mach 20	Mach 11
No. 5	Mach 3	Mach 4	Mach 5	Mach 6	Mach 7	Mach 8	Mach 9	Mach 10	Mach 1	Mach 2
No. 6	Mach 13	Mach 14	Mach 15	Mach 16	Mach 17	Mach 18	Mach 19	Mach 20	Mach 11	Mach 12
No. 7	Mach 4	Mach 5	Mach 6	Mach 7	Mach 8	Mach 9	Mach 10	Mach 1	Mach 2	Mach 3
No. 8	Mach 14	Mach 15	Mach 16	Mach 17	Mach 18	Mach 19	Mach 20	Mach 11	Mach 12	Mach 13
No. 9	Mach 5	Mach 6	Mach 7	Mach 8	Mach 9	Mach 10	Mach 1	Mach 2	Mach 3	Mach 4
No. 10	Mach 15	Mach 16	Mach 17	Mach 18	Mach 19	Mach 20	Mach 11	Mach 12	Mach 13	Mach 14
No. 11	Mach 6	Mach 7	Mach 8	Mach 9	Mach 10	Mach 1	Mach 2	Mach 3	Mach 4	Mach 5
No. 12	Mach 16	Mach 17	Mach 18	Mach 19	Mach 20	Mach 11	Mach 12	Mach 13	Mach 14	Mach 15
No. 13	Mach 7	Mach 8	Mach 9	Mach 10	Mach 1	Mach 2	Mach 3	Mach 4	Mach 5	Mach 6
No. 14	Mach 17	Mach 18	Mach 19	Mach 20	Mach 11	Mach 12	Mach 13	Mach 14	Mach 15	Mach 16
No. 15	Mach 8	Mach 9	Mach 10	Mach 1	Mach 2	Mach 3	Mach 4	Mach 5	Mach 6	Mach 7
No. 16	Mach 18	Mach 19	Mach 20	Mach 11	Mach 12	Mach 13	Mach 14	Mach 15	Mach 16	Mach 17

19

BUS 110

Rotating Schedule for Office Machines

Page 2

<u>Student</u>	<u>Week 1</u>	<u>Week 2</u>	<u>Week 3</u>	<u>Week 4</u>	<u>Week 5</u>	<u>Week 6</u>	<u>Week 7</u>	<u>Week 8</u>	<u>Week 9</u>	<u>Week 10</u>
No. 17	Mach 9	Mach 10	Mach 1	Mach 2	Mach 3	Mach 4	Mach 5	Mach 6	Mach 7	Mach 8
No. 18	Mach 19	Mach 20	Mach 11	Mach 12	Mach 13	Mach 14	Mach 15	Mach 16	Mach 17	Mach 18
No. 19	Mach 10	Mach 1	Mach 2	Mach 3	Mach 4	Mach 5	Mach 6	Mach 7	Mach 8	Mach 9
No. 20	Mach 20	Mach 11	Mach 12	Mach 13	Mach 14	Mach 15	Mach 16	Mach 17	Mach 18	Mach 19
No. 21	Mach 1	Mach 2	Mach 3	Mach 4	Mach 5	Mach 6	Mach 7	Mach 8	Mach 9	Mach 10
No. 22	Mach 11	Mach 12	Mach 13	Mach 14	Mach 15	Mach 16	Mach 17	Mach 18	Mach 19	Mach 20
No. 23	Mach 2	Mach 3	Mach 4	Mach 5	Mach 6	Mach 7	Mach 8	Mach 9	Mach 10	Mach 1
No. 24	Mach 12	Mach 13	Mach 14	Mach 15	Mach 16	Mach 17	Mach 18	Mach 19	Mach 20	Mach 11

CODE: Machine 1--xxxxxxxxxxx
Machine 2--xxxxxxxxxxx
Machine 3--xxxxxxxxxxx
Machine 4--xxxxxxxxxxx
Machine 5--xxxxxxxxxxx
.
.
Machine 20--xxxxxxxxxxx

20

BUS 110

217

218

KEY-DRIVEN CALCULATOR

Trial-Divisor Division

(Note: This information sheet is a supplement to the instructions given in the text; they should both be studied; both are important!)

Before an operator attempts to perform any part of the division cycle, he/she should review the mathematics of division.

The parts of a division problem are:

	quotient
divisor	)dividend

An example:

25	) 105	4 r 5	(Remember fifth grade?
	100		"R" means remainder!)
	5		

Division is the process of finding how many times one number (the divisor) is contained in another number (the dividend). To accomplish this on the key-driven calculator requires concentration because both the dividend and quotient are found in the same dials.

In division, we simply subtract the divisor from the dividend until it is "less than." By looking at a trial divisor, however, we can get an "educated guess" about how many times to subtract. After we've subtracted our "educated guess" on the machine, our dials show a remainder which is often still larger than our divisor. So, we continue to subtract until our remainder is "less than" our divisor.

For example, divide: 3456128 by 25

In fifth grade, we would have written: $25 \overline{)3456128}$

On the key-driven calculator, we put the dividend into the machine first:

3 45 6128

The first number in the dividend is our "trial divisor," or "educated guess" - the number of times we think we will have to subtract. The numbers following the trial divisor are the remainder (45).

Trial Divisor ---- 3 (45) 6128

-----Remainder

Moving the fingers one column to the right will change the trial divisor to 4 and the remainder to 56.

3 4 (56) 128

Trial Divisor ---- -----Remainder

After the dividend is in the machine, we should:

1. Place a decimal marker where it appears in the dividend of the problem and then move it one column to the left for each whole number in the divisor.
2. Position the fingers over the keys for the divisor using small figures less 1.
3. Depress the fingers, if necessary, until the remainder becomes smaller than the divisor.
4. Move the fingers one column to the right.
5. Equal the trial divisor by depressing the complement of the divisor until the number of depressions equals the trial divisor.
6. Reduce the remainder by depressing the complement of the divisor until the remainder becomes smaller than the divisor.
7. Move the fingers one column to the right.
8. Repeat the division cycle of "equal, reduce, and move" until the division has been carried out to the desired number of decimal places.
9. Multiply the quotient by the divisor and add in the remainder in order to prove the accuracy of the answer.

Points to remember in division:

1. The dividend is entered at the extreme left of the machine, using large numbers.
2. The decimal point in the dividend is moved one place to the left for each whole number in the divisor.
3. The decimal point in the dividend is not moved if the divisor is a decimal, for example, .257.
4. The decimal point in the dividend is moved one place to the right for every preceding zero in a decimal divisor; for example, .0245.
5. The trial divisor is the figure to the left of the columns over which the fingers are held.

6. The trial divisor may never be larger than 9.
7. The trial divisor is equaled when the number of depressions (really subtractions) is the same as the figure in the trial divisor column.
8. The remainder is reduced only after the trial divisor has been equaled.
9. To reduce the remainder, depress the complement of the divisor (really subtract the divisor) until the remainder becomes smaller than the divisor.
10. The division cycle consists of (a) equal the trial divisor, (b) reduce the remainder, and (c) move one column to the right.
11. To prove the accuracy of the answer, multiply the quotient by the divisor, and add in the remainder (if there is one).
12. A beginner should whisper the count as he/she attempts to equal the trial divisor so that he/she can use his/her auditory sense to keep track of the count and his/her sense of sight to keep track of the changes that occur in the trial divisor. After he/she becomes proficient in complementary division, he/she need not whisper the count. His/her sense of sight can take care of both tasks.

SYLLABUS FOR
OFFICE MACHINES II
BUS 210

A large variety of office machines are now being marketed. Based on a survey of the fifty-seven institutions, a variety of machine types and models are being used in our classrooms. Therefore, it appears to be more appropriate for instructors to survey their local community and make decisions on the types and models of machines to rent, purchase or use in the classroom.

A syllabus or course description will not be developed as a guide for this course. Assistance from Program Development Division, Department of Community Colleges will be provided, individually, upon request. Hours should be consistent with Office Machines I.

Machines and units that could be utilized in the course are: (1) billing machines, (2) reprographics unit, (3) automatic and executive typewriters and (4) data processing equipment.

SYLLABUS FOR
OFFICE MANAGEMENT
BUS 271

This syllabus was developed by Ethel Lassiter Cotton, Business Instructor, Craven Community College and reviewed by Benjamin J. Leith, Business Department Chairperson at Craven and Mrs. Joan Citty, Business Department Chairperson, Rockingham Community College and members of the Business Programs Curriculum Advisory Committee.

Appreciation is expressed to Mrs. Cotton and Craven Community College and to Mr. Leith and Mrs. Citty for their cooperation and assistance in developing and reviewing this syllabus.

INTRODUCTION

This course represents a comprehensive survey of the most acceptable methods and practices of office administration. The student is asked to answer and solve questions, cases and problems in order to facilitate the learning process. Special emphasis is placed on two basic concepts of successful business management, communicating and dealing with people and cost reduction.

Office administration is not static; changes are constantly being made in methods, equipment, systems and practices. Therefore, the instructor is responsible for keeping up-to-date by reviewing professional literature and working with the business community. One valuable aid is the use, by both students and instructors, of a comprehensive library of materials on office management.

BUSINESS 271 OFFICE MANAGEMENT

I. DESCRIPTION OF COURSE:

The student will study and apply the fundamental principles and practices of office management. Emphasis is on the role of office management, including functions, office automation, planning, controlling, organizing and making judgments and decisions based on the nature and size of the business and experience of the manager.

II. COURSE OBJECTIVES:

Given the materials as presented in this course, the student will be able to apply the fundamental practices and principles of management, organize and plan administrative office services and demonstrate decision-making techniques in accomplishing office work and dealing with personnel.

III. COURSE OVERVIEW:

- A. Administrative office management in modern business
 - 1. Introduction to the information management concept
 - 2. Automation in the modern office
- B. Organizing and planning administrative office services
 - 1. Office layouts
 - 2. Office equipment
 - 3. Psychological and physical factors in the office environment
 - 4. Interoffice communication, information and records management
 - 5. Auxiliary administrative services
- C. Leadership and human relations in office administration
 - 1. Staffing and supervision of office activities
 - 2. Current personnel policies and practices
- D. Controlling office administrative operations through cost reduction
 - 1. Systems and procedures analysis
 - 2. Forms design and control
 - 3. Mechanization of basic accounting procedures
 - 4. Job analysis
 - 5. Work measurement and standards
 - 6. Salary administration
 - 7. Budgetary control and report preparation
 - 8. Development of office manuals
- E. Business information processing systems
 - 1. Punched-card systems
 - 2. Integrated data processing
 - 3. Electronic data processing systems

IV. CREDITS, HOURS, PREREQUISITES:

- A. Three-five (3-5) quarter hours credit
- B. Three-five (3-5) class hours per week; zero-two (0-2) laboratory hours per week
- C. No prerequisite

V. EVALUATION:

Evaluation will be based on the completion of stated objectives and should include one or more of the following:

- A. Objective-type test
- B. Discussion-type test
- C. Problems and cases

COMPETENCIES FOR OFFICE MANAGEMENT

Knowledge of the role of an information manager.

Knowledge of the effects of automation on office jobs, education and training of office personnel and company operations.

Organize and plan office services.

Ability to use proper procedures and techniques for staffing an office.

Ability to function as a supervisor.

Knowledge of promotional plans and training programs.

Knowledge of systems analysis as it pertains to office systems and procedures.

Knowledge of budgets needed in operating an office.

Prepare an office manual.

Competency

Content Outline

Activity Experience

Evaluation

I. Administrative Office Management in Modern Business

- A. The student will be able to identify and demonstrate in writing the role of an information manager.

- B. The student will be able to identify and demonstrate in writing the steps in a feasibility study on the installation of a computer.

The student will be able to identify the effects of automation on office jobs, education and training of office workers, middle management and company operations.

I. Administrative Office Management in Modern Business

- A. The information management concept

1. Changing currents in the office
2. The function of management
3. The Administrative Office Management (AOM) function
4. Scientific management in the office
5. Behavioral concepts in AOM
 - a. Theory X
 - b. Theory Y
6. Decision-making concepts
7. The role of the AO manager
8. The management of information
9. The changing office employment scene

- B. Automation in the office

1. The nature of automation in the office
2. Planning for automated office operations
3. The effects of automation in the office

I. Administrative Office Management in Modern Business

- A. Lecture/discussion

Illustration on chalkboard of a company-wide information network; organizational patterns in office management; information flow system for decision-making.

Student application on practical office cases and questions for discussion.

- B. Lecture/discussion

Student application on questions for review, questions for discussion, and assigned practical office cases.

I. Administrative Office Management in Modern Business

- A. Given the appropriate data, the student will prepare a report for the president containing recommendations.

Given the appropriate data, the student as advisor to the president, will recommend candidates for employment to the president, and state reasons why other candidates were rejected.

- B. Given the appropriate data, the student will evaluate the feasibility approach recommended for a particular company.

Competency	Content Outline	Activity Experience	Evaluation
II. Organizing and Planning Administrative Office Services	II. Organizing and Planning Administrative Office Services	II. Organizing and Planning Administrative Office Services	II. Organizing and Planning Administrative Office Services
A. The student will be able to differentiate between	A. Guiding principles of organization	A. Lecture/discussion	A. Given the appropriate data, the student will prepare a partial organization chart showing the line-and-staff arrangements.
1. Organizing and planning	1. Principle of objectives	Illustration of different forms of organizations with handouts for students.	Given a discussion-type test, the student will be able to differentiate between organizing and planning and authority and responsibility.
2. Authority and responsibility	2. Principle of responsibility	Student application on assigned problems and cases.	
	3. Principle of unity of functions		
	4. Principle of simplicity		
	5. Principle of individual relationships		
	6. Principle of delegating authority commensurate with responsibility		
	7. Principle of reporting to a single supervisor		
	8. Principle of supervision and leadership		
	9. Principle of span of control		
B. The student will be able to describe briefly the four forms of organization.	B. Forms of organization	B. Lecture/discussion	B. Given a discussion-type test, the student will be able to describe the four forms of organization.
	1. Line	Illustration of different forms of organizations with handouts for students.	
	2. Functional	Student application on assigned problems and cases.	
	3. Line and staff		
	4. Committee		
C. The student will be able to develop the steps in assembling an organization chart.	C. The organization chart	C. Lecture/discussion	C. Given an objective-type test, the student will be able to identify the steps in assembling an organization chart.
	1. Definition	Illustration of the organization chart for management.	
	2. Ten suggestions for preparing organization charts.	Student application on assigned problems and cases.	

Competency	Content Outline	Activity Experience	Evaluation
D. The student will be able to list the advantages and disadvantages of centralizing office services. The student will be able to describe how office services are provided in a substation.	D. Centralized vs. decentralized organization - Substation - Advantages - Disadvantages - Office services in a substation	D. Lecture/discussion Illustration of the organization chart for management. Student application on assigned problems and cases.	D. Given an objective-type test, the student will be able to (1) identify the advantages and disadvantages of centralizing office services and (2) describe office services in a substation.
E. The student will be able to distinguish between "office layout" and "space management". The student will be able to compare and contrast four methods for an office space study. The student will be able to explain the four factors influencing office space management.	E. Space management in the office - Objectives of space - Management in the office - The physical office - Organizational needs in space management - Space planning by function - Work center concept - Private vs. general offices - Special work centers - Principles of space management - Space guidelines for efficient work - Space guidelines for personnel - Space guidelines for furniture and equipment - The office space study: alternative methods	E. Lecture/discussion Illustration of an office space plan.	E. Given the appropriate data, the student will revise an office space plan and, as administrative assistant, will design a reception center space plan for two doctors who are specialists in internal medicine. Given a discussion-type test, the student will be able to (1) distinguish between office layout and space management, (2) compare and contrast at least two of the four methods for office space study and (3) explain at least two of the four factors influencing office space management.

Competency

Content Outline

Activity Experience

Evaluation

- F. The student will be able to list the reasons why the procurement, maintenance and replacement of office machines should be centrally controlled.

The student will be able to develop plans and reports for an office layout.

- F. The office environment: furniture and equipment

1. Selection
2. Procurement
3. Maintenance
4. Replacement
5. Centralized control

- F. Lecture/discussion

Illustration of office layout with handouts for students.

Student application on assigned questions and office cases.

- F. Given an objective-type test, the student will be able to develop a comprehensive set of criteria for selecting office furniture and equipment and explain why procurement, maintenance and replacement should be centrally controlled.

Given the appropriate data, the student will use a sheet of graph paper to make either template designs or a line drawing scale of desks and equipment and prepare a floor plan showing the layout of the desks, private offices' furniture and equipment. In addition, the student will prepare a report describing reasons for the layout.

- G. The student will be able to analyze and outline the office environment from a psycho-physiological viewpoint and its effects on the worker's behavior.

- G. Psycho-physiological factors in the office environment

1. Seeing environment
 - a. Lighting (natural and artificial)
 - b. Color
2. Atmospheric environment
 - a. Humidity, circulation
 - b. Air, temperature
3. Surface environment
 - a. Color
 - b. Cleanliness
4. Hearing environment- noise control
 - a. Carpeting
 - b. Acoustics

- G. Lecture/discussion

Student application on questions for discussion and office case.

- G. Given the appropriate data, the student, as an office-planning expert, will recommend to the office manager ways of reducing tensions and improving office workers' efficiency.

Competency

Content Outline

Activity Experience

Evaluation

H. The student will be able to identify the Main considerations involved in setting up an effective communication program.

H. Communication services in the office

1. Definition
2. Purpose
3. The office communication system
 - a. Essential conditions
 - (1) Information transmitted quickly
 - (2) Information must be accessible
 - (3) Information provided on an economical basis (volume and urgency)
 - (4) Information should be accurate and received in usable condition
4. Communication media in the office
 - a. Written communication
 - b. Voice communication
5. Data communication system
6. Planning communication services

H. Lecture/discussion

Student application of office cases.

The speaking/teaching outline on communication in business may be useful for this section. (Refer to bibliography.)

H. Given the appropriate data, the student will solve this problem: The Tri-State Mfg. Co. has its main administrative offices in St. Louis, Missouri, with branch offices and warehouses in three other states. The office manager has been faced with mounting telephone costs resulting from increased sales volume. On the basis of the information, suggest how the company can develop a data communication network that will handle effectively the following:

1. Daily interoffice phone calls for office staff - 120 employees.
2. Long distance phone calls from main office to branches many times of the day - no accurate record kept.
3. Interbranch calls - five to ten times daily for each branch.

I-J. The student will be able to identify the steps in a typical records cycle, and to state which steps require the greatest study and control by the office manager.

I. Information and records management

1. The records cycle
2. Records management programs
 - a. Objectives of R.M. program
 - b. Organization chart of records management
 - c. Personnel of records management
 - d. Cost of records management
 - e. Evaluation of records management

I-J. Lecture/discussion

Illustration of organization chart of records management; decentralized and centralized filing and retrieval of records with handouts for students.

I-J. Given the appropriate data, the student will prepare a report showing the cost of operating and equipping a centralized filing department for a specific company for five years. This report will become part of the office manager's recommendation to the company's President for the centralization of the filing department.

Competency

Content Outline

Activity Experience

Evaluation

K. The student will be able to identify the functions of the typical mail department manager and develop a plan for a mail management program.

3. Files management
 - a. Decentralized filing
 - b. Centralized filing
 - c. Filing systems
 - (1) Alphabetic
 - (2) Numeric
 - d. Filing equipment and supplies
 - e. Evaluation of filing equipment
4. Management of automated records
 - a. Records in microfilm
 - b. Microfilm equipment

J. Information and records retrieval

1. Retention of records
2. Disposition of records

K. Auxiliary administrative services

1. Management of mailing services
2. Principles of mailing management
 - a. Planning the mailing services
 - b. Organizing the mailing center
 - c. Defining and assigning responsibilities to trained personnel
 - d. Establishing operating controls
 - e. Providing adequate space for the mailing center
 - f. Developing efficient mailing procedures
 - g. Procuring efficient mailing equipment
 - h. Carefully controlling costs
 - i. Maintaining periodic reviews

K. Lecture/discussion

Illustration of various plans for a mail management program with hand-outs for students.

Student application on questions for discussion and office cases.

K. Given the appropriate data, the student will develop a comprehensive mail management program plan for a firm occupying the top 12 floors of a 30-story office building.

Competency

Content Outline

Activity Experience

Evaluation

3. Management of reproduction services
 - a. Duplicating processes
 - b. Imprinting processes
4. Principles of reproduction services management
 - a. Planning the reproduction services
 - b. Organizing the reproduction services center
 - c. Defining responsibilities for reproduction services
 - d. Establishing operating controls
 - e. Planning adequate space
 - f. Developing efficient reproduction equipment
 - g. Procuring efficient reproduction equipment
 - h. Controlling cost of reproduction services
 - i. Maintaining periodic reviews

Competency	Content Outline	Activity Experience	Evaluation
III. Leadership and Human Relations in Office Administration	III. Leadership and Human Relations in Office Administration	III. Leadership and Human Relations in Office Administration	III. Leadership and Human Relations in Office Administration
A. The student will be able to prepare a job interview.	A. Staffing the office 1. Sources of office workers a. Employment agencies b. Advertising c. Friends of employees, customers and officers of the firm d. Schools, colleges and their placement offices e. Other sources of office employees 2. Procedures for employing office workers a. Personnel requisition blank b. Application blank c. The interview and record or interview d. References of applicants e. Record of employment 3. The use of tests in selecting workers a. Test used in selecting office workers (1) Intelligence tests (2) Aptitude and utility tests (3) Achievement tests (4) Personality, interest and attitude inventories b. Trends in employment testing	A. Lecture/discussion Student application on assigned questions for discussion and office cases. Video-tape job interviews. Role-play situation- job interview.	A. The student, as administrative manager responsible for staffing the office of a company which has been in business for 50 years, will develop a job interview plan which will assure that each job applicant is given a complete and fair interview. (Job opening is Key-punch Operator).

Competency

Content Outline

Activity Experience

Evaluation

B. The student will be able to identify the functions of supervision.

B. Effective supervision of office activities

4. Government regulations affecting the selection of office workers
 - a. Civil Rights Act of 1964
 - b. Age discrimination - employment
 5. Employing the disadvantaged
1. Duties of the supervisor
 2. The supervisor's place in office organization
 3. Human relations in supervision
 - a. Personal characteristics of supervisors
 - b. A human relations checklist for supervisors
 - c. Delegating
 - d. Discipline
 - e. Impartiality
 - f. Counseling
 - g. Morale
 4. Developing and maintaining leadership ability
 - a. Supervisory training
 - b. Illustrative examples of formal supervisory training programs
 5. Recognition of the supervisor
 - a. Organization chart showing where supervisors "fit into the picture."
 - b. Definite statement of duties and responsibilities
 - c. Recognition for a job well done

B. Lecture/discussion

Student application on assigned questions for discussions and office cases.

Class visit and/or field trip by the supervisor of a small, medium and/or large office.

B. Given the appropriate data, the student will analyze the supervisory technique.

Competency	Content Outline	Activity Experience	Evaluation
	d. Pay commensurate with responsibilities e. Supervisory rating system f. Supervisor should be able to see supervisors as often as necessary.		
C. The student will be able to develop personnel policies for a business firm.	C. Human relations and office personnel policies 1. Labor relations in the office a. A brief history of the labor movement b. Labor legislation c. Trends in labor-management relations d. Labor unions for whitecollar workers e. Statutes of white-collar unions f. The role of the office manager in relation to office unions g. Provisions contained in the white-collar union contract 2. Employer-employee communications a. Providing for two-way communications b. Employee suggestion systems 3. Ethics in the office	C. Lecture/discussion Student application on assigned questions and cases. Handouts on personnel policy of various forms and manuals. Class visit by a personnel officer.	C. Given the appropriate data, the student will outline the approach and develop a workable personnel policy for the office.

Competency

Content Outline

Activity Experience

Evaluation

D. The student will be able to identify current practices regarding personnel problems that occur in the office and suggest appropriate solutions to these problems.

D. Current office personnel practices

1. Practices relating to fringe benefits
 - a. Coffee breaks and rest periods
 - b. Cafeteria services
 - c. Music in the office
 - d. Recreational programs
 - e. Vacations
 - f. Holidays with pay
 - g. Insurance
 - h. Retirement and pension benefits
 - i. Educational assistance
2. Practices affecting the physical and mental well-being of employees
 - a. Smoking in the office
 - b. Safety in the office
 - c. Receiving personal mail in the office
 - d. Personal use of telephone
 - e. Alcoholism
 - f. Drugs and narcotics
 - g. Nepotism

E. The student will be able to distinguish between the concepts of training and learning and identify relevance of this distinction.

E. Training, orienting and promoting office personnel

1. Training
 - a. Objectives of training
 - b. Principles of training
 - c. Types of training
 - d. Responsibility for training
 - e. Training methods and techniques
2. Orienting
3. Promoting

D. Lecture/discussion

Illustration of calculation of the turnover rate.

Discussion by a top manager and/or personnel officer on employee/management problems.

D. Given the appropriate data, the student will objectively evaluate a problem concerning the employment of a company vice president's son-in-law, knowing of other vice president's viewpoints on nepotism.

E. Lecture/discussion

Student application on assigned office cases and questions.

E. Given the appropriate data, the student will determine the need for a remedial training program by answering a specific set of questions.

Competency

Content Outline

Activity Experience

Evaluation

F. The student will be able to define the role of supervisor in an effective training and development program and list the major characteristics of a successful promotion plan.

F. Evaluating the training program

F. Lecture/discussion

Have students visit local offices and obtain copies of promotional plans and training programs.

F. Given an objective-type test, the student will define the role of the supervisor in training and list the major characteristics of a successful promotion plan.

Competency

Content Outline

Activity Experience

Evaluation

IV. Controlling Office Administrations Operations

- A. The student will be able to prepare an analysis of office systems and procedures.

IV. Controlling Office Administrations Operations

- A. Systems and procedures analysis
1. The nature of systems, procedures and methods
 - a. Common office systems and procedures
 - b. Objectives of systems and procedures analysis
 - c. Importance of systems and procedures analysis
 2. Organizing for systems and procedures analysis
 - a. Employing a firm of management consultants or engineers
 - b. Developing an internal staff of systems and procedures analysts
 - c. Assigning systems and procedures analysis to the office manager
 3. Analyzing office systems and procedures
 - a. Studying the forms used
 - b. Survey method of analyzing office systems and procedures.

IV. Controlling Office Administrations Operations

A. Lecture/discussion

Handouts of job survey forms.

Illustration of:

1. Standardized flow process chart symbols developed by the American Standards Association.
2. Proper office layout consistent with the flow of paper work.
3. Flow chart symbols and definitions for information processing.

Student application on assigned cases.

Have class visit by systems analyst to explain systems and procedures methods.

IV. Controlling Office Administrations Operations

- A. Given the appropriate data, the student will prepare a flow process chart of the present operations and the proposed operations of an office using the American Standard Association's standardized symbols.

Competency

Content Outline

Activity Experience

Evaluation

B. The student will be able to identify the advantages of standardized business forms.

B. Forms design and control

1. Nature of office forms
2. Principles of forms design and control
 - a. Principle of use
 - b. Principle of standardization
 - c. Principle of centralized control
3. Designing office forms
 - a. A check sheet for forms design
 - b. An illustration of good forms design
4. Kinds of office forms
 - a. Carbonless and carbon-coated forms
 - b. Continuous forms
 - c. Unit-set snap-out forms
 - d. Two-wide forms
 - e. Tab card forms
 - f. MICR (Magnetic Ink Character Recognition)
5. The forms control program
 - a. Collecting and analyzing forms
 - b. Eliminating, consolidating and standardizing forms
 - c. Initiating and revising forms
 - d. Printing the forms
6. Applied forms control

B. Lecture/discussion

Handouts and examination of various types of office forms.

Student application on assigned questions for discussion and office cases.

B. Given the appropriate data, the student will prepare a brief report on correcting a faulty forms procedure.

254

253

Competency

Content Outline

Activity Experience

Evaluation

C. The student will be able to identify factors which account for the trend toward increased mechanization of office work.

C. The mechanization of basic accounting procedures

1. The administrative office manager's role in the mechanization of procedures
 - a. Separate order processing and billing procedures
 - b. Unified prebilling procedures
 - c. Write-it-once order processing and billing procedure
 - d. Cycle billing
 - e. Using an outside data service center
 - f. Basic computing machines
2. Payroll accounting procedures
 - a. Outline of basic payroll accounting procedures
 - b. Types of payroll accounting procedures
 - c. Using an outside data service center
3. Purchasing - receiving procedure
5. Invoice processing procedure

D. The student will be able to identify and discuss briefly each of the five basic methods of job evaluation indicating under what conditions each method might be used most satisfactorily.

D. Analyzing office jobs

1. Job analysis
2. Methods of gathering job information
 - a. Questionnaire
 - b. Interview
 - c. Observation
 - d. Combination of methods
3. Job description
 - a. Writing the job description
 - b. Typical job descriptions

C. Lecture/discussion

Handouts on various accounting procedures.

Illustrations of order processing and billing procedures.

Student application on assigned office cases and questions.

D. Lecture/discussion

Handouts on various office job descriptions, specifications and job evaluation.

C. The student will outline the steps involved in a typical payroll accounting procedure and discuss the advantages and disadvantages of mechanization in this process.

D. Given the appropriate data, the student will, as assistant office manager, write a report recommending the installation of a job evaluation method in the company.

Competency

Content Outline

Activity Experience

Evaluation

4. Job specifications
5. Job evaluation
 - a. Ranking method
 - b. Job classification method
 - c. Factor - comparison method
 - d. Point method
 - e. Guideline method
 - f. Relative use of the job evaluation methods

E. The student will be able to identify reasons why the administrative office manager should utilize work standards as tools of managerial control.

E. Work measurement and work standards

1. Nature of work measurements and work standards
 - a. Benefits to be realized from work standards
 - b. Reasons for failure to apply work measurements
 - c. Office operations that can be measured
2. Preparing for the work measurement program
 - a. Gaining management's support
 - b. Communicating the program to employees
 - c. Administering the program
 - d. Selection of analysts
 - e. Feasibility and accuracy of the standards
3. Methods of measuring work and setting standards
 - a. Past performance method
 - b. Time analysis method
 - c. Work sampling method
 - d. Motion study and time study
 - e. Standard time data

E. Lecture/discussion

Student application on assigned cases and questions.

E. Given the appropriate data, the student, as supervisor of the centralized typewriting service center, will prepare a formal report measuring typewritten work and setting standards.

Competency

Content Outline

Activity Experience

Evaluation

F. The student will be able to identify major provisions of the Fair Labor Standards Act that are important to the office salary administrator when evaluating employees.

F. Office salary administration

1. Determining compensation for office personnel
 - a. Wages and salaries paid by other companies
 - b. Governmental regulations
2. Incentive wage systems
 - a. Individual incentives
 - b. Group incentives
 - c. Illustrative office incentive standards
3. Employee evaluation as part of the office salary administration program
 - a. Factors to rate
 - b. Methods of employee evaluation
 - c. Illustrative employee evaluation forms
 - d. Weaknesses of employee evaluation forms
 - e. Who should do the evaluating?
4. Fringe benefits in the office

F. Lecture/discussion

Illustration of salary range and annual increment for five job levels calculated by the Point Method of Job Evaluation.

Student application on assigned cases.

F. Given the appropriate data, the student will prepare an employee evaluation form and use this form to evaluate three employees.

G. The student will outline methods to follow in controlling and reducing office stenographic costs.

G. Cost control of administrative office services

1. Developing cost consciousness
2. Cost analysis of office plant and equipment policies
3. Cost analysis of office systems and procedures
4. Analyzing the costs of forms and supplies
5. Reducing correspondence costs
6. Reducing mailing costs

G. Lecture/discussion

Illustration of annual savings of a business when contents of one four-drawer file cabinet are transferred to inactive storage.

Handout on cost reducing suggestions.

Student application on assigned problems and questions.

G. Given the appropriate data, the student, as administrative manager for a specific company, will outline a program of attack and indicate step by step how to solve the problem of reducing stenographic costs.

Competency

Content Outline

Activity Experience

Evaluation

7. Reducing the costs of records management
 - a. The cost of records management
 - b. Savings realized from studies of records management
 - c. Cost reduction suggestions
8. Reducing the costs of reproduction services
 - a. The cost of duplicating process
 - b. The cost of office copiers
9. Reducing the cost of inter communications
10. Cost control in data processing centers
11. Scientific management and behavioral science goals of cost control
 - a. Quality control
 - b. Error factor analysis and reduction
 - c. Zero defects plan
 - d. Visual control boards
 - e. PERT & CPM (Program Evaluation and Review Technique and Critical Path Method or Operations Research)
12. Improving executive control

Competency

Content Outline

Activity Experience

Evaluation

H. The student will be able to differentiate between the budget of administrative office expenses and the master budget.

H. Budgetary control and report preparation

1. Budgetary control of office costs
2. Principles of preparing
 - a. Budget of administrative office expenses
 - b. Principle of target setting
 - c. Principle of objectivity
 - d. Principle of flexibility
 - e. Principle of adherence
 - f. Principle of review
3. Preparing the budget of administrative office expenses
 - a. Kinds of office expenses
 - b. Allocating office expenses
 - c. Comparing budgeted with actual costs
 - d. The master budget
 - e. Problems of cost analysis arising through budgetary control
4. Principles of report preparation
 - a. Principle of purpose
 - b. Principle of organization
 - c. Principle of brevity
 - d. Principle of clarity
 - e. Principle of scheduling
 - f. Principle of cost
5. Presenting data in tabular and graphic form
 - a. Presenting data in tabular form
 - b. Presenting data in graphic form
 - (1) Bar chart
 - (2) Pictogram
 - (3) Line chart
 - (4) Component parts chart
 - (5) Map

H. Lecture/discussion

Illustration of:

- (1) An estimated (pro-forma) income statement
- (2) A budget showing the comparison of actual versus budgeted expenses.

Student application on assigned cases.

H. Given the appropriate data, the student will prepare a three-month comparison of budgeted and actual figures for office costs.

Competency	Content Outline	Activity Experience	Evaluation
I. The student will be able to identify the purposes of office manuals and the benefits derived from them by employer/employee.	I. Office manuals - A tool of cost control 1. Types of office manuals a. Policy manual b. Organization manual c. Administrative practical manual d. Departmental practice manual 2. Preparing office manuals a. Steps in preparing office manuals b. Writing the office manual c. Revising the office manual d. Distributing the office manuals 3. Using office manuals a. Advantages of using office manuals b. Disadvantages of using office manuals 4. Evaluating office manuals	I. Lecture/discussion Student application on assigned questions and cases.	I. Given the appropriate data, the student will prepare a formal report proposing the preparation and use of a correspondence manual.

Competency

Content Outline

Activity Experience

Evaluation

V. Business Information Processing Systems

- A. The student will be able to identify advantages and disadvantages for automation in the office.

- B. The student will be able to compare and contrast the advantages and disadvantages of punched cards and magnetic tape when used as input media.

The student will be able to briefly describe the major kinds of output devices and the media produced by each.

V. Business Information Processing Systems

- A. Punched-card and integrated data processing systems

1. Nature of punched-card system
 - a. Input
 - b. Output
 - c. Peripheral equipment
 - d. Summary of the steps in the punched-card system
2. A punched-card system - Payroll accounting
 - a. Payroll master card
 - b. Deduction card
 - c. Time card
 - d. Output
3. Integrated data processing (IDP)
 - a. Common-language type
 - b. Common-language machines
 - c. IDP common-language tapes
 - d. IDP using punched cards and common-language tapes
 - e. Advantages of IDP
 - f. Data communication and punched-card systems

- B. Electronic data processing (EDP)

1. History of the computer
 - a. First generation (1950-55)
 - b. Second generation (1955-64)
 - c. Third generation (1964-71)
 - d. Fourth generation (1971-)

V. Business Information Processing Systems

- A. Lecture/discussion

Student application on assigned cases.

Have a class visit by a supervisor of a data processing center to explain how data is handled in a company utilizing the computer.

- B. Lecture/discussion

Handouts on EDP systems.

Student application on assigned problems and questions.

V. Business Information Processing Systems

- A. Given the appropriate data, the student, as office manager, will prepare a report identifying the advantages and disadvantages for automating the office and list the procedures to be followed.

- B. Given the appropriate data, the student will outline recommendations for correcting the problem of processing customer complaints.

Competency	Content Outline	Activity Experience	Evaluation
	2. The electronic computer a. Components of the computer system b. Steps in the electronic computer system c. Block diagramming (Flow charting) d. Computer languages 3. Illustrative EDP systems a. Burroughs Corporation's L5000 Magnetic Record Computer b. Singer System Ten c. IBM System /360 Model 20 d. Other 4. Illustrative EDP application a. Requirements of the output form b. Preparing the electric bills c. Processing customers payments 5. Computer service centers 6. Time sharing 7. Management information systems 8. Other		

BIBLIOGRAPHY

1. Books

Chambers, Harry T. Office Planning for Profit. Boston: Cahners Publishing Co., Inc., Current Edition.

The Dartnell Office Administration Handbook. Chicago: Dartnell Corporation, Current Edition.

Eisenberg, Joseph. Turnaround Management: A Manual for Profit Improvement and Growth. New York: McGraw-Hill Book Company, Current Edition.

Glover, John D. and Ralph M. Hower. Administration: Cases on Human Relations in Business. Homewood, Illinois: Richard D. Irwin, Inc., Current Edition.

Grillo, Elmer V. and Charles J. Berg. Work Measurement in The Office. New York: McGraw-Hill Book Company, Current Edition.

Heyel, Carl. Handbook of Modern Office Management and Administrative Services. New York: McGraw-Hill Book Company, Current Edition.

Huffman, Harry and others. Office Procedures and Administration. New York: McGraw-Hill Book Company, Current Edition.

Johnson, H. Webster and William G. Savage. Administrative Office Management. Reading, Massachusetts: Addison-Wesley Publishing Co., Inc., Current Edition.

Littlefield, Cleatice L. and Frank Rachel. Office and Administrative Management: Systems Analysis, Data Processing and Office Services. Englewood Cliffs: Prentice-Hall, Inc., Current Edition.

McCook, Barbara. Office Procedures With Simulated Practice. Beverly Hills: Glencoe Press, Current Edition.

Morrison, Richard J. and others. Work Measurement in Machine Accounting: Controls, Incentives, Scheduling and Costing Procedures. New York: Ronald Press Co., Current Edition.

Nance, H.W. and R.E. Nolan. Office Work Measurement. New York: McGraw-Hill Book Company, Current Edition.

Neuner, John B. and others. Administrative Office Management. Cincinnati: South-Western Publishing Co., Current Edition.

Pfiffner, John M. and F. Sherwood. Administrative Organization. Englewood Cliffs: Prentice-Hall, Inc., Current Edition.

Rippen, K. H. Office Space Administration. New York: McGraw-Hill Book Company, Current Edition.

Saphier, M. Office Planning and Design. New York: McGraw-Hill Book Company, Current Edition.

Steere, Ralph E. Office Work Simplification. Connecticut: Foreman's Institute, Current Edition.

Strong, Earl P. and Robert D. Smith. Management Control Models. New York: Holt, Rinehart and Winston, Inc., Current Edition.

Terry, George R. Office Automation. Homewood, Illinois: Dow-Jones-Irwin, Inc., Current Edition.

Terry, George R. Office Management and Control. Homewood, Illinois: Richard D. Irwin, Inc., Current Edition.

Terry, George R. Office Systems and Procedures. Homewood, Illinois: Dow-Jones-Irwin, Inc., Current Edition.

Wylie, Harry L. Office Management Handbook. New York: Ronald Press Company, Current Edition.

2. Periodicals

Administrative Management. Geyer - McAllister Publications, Incorporated, 51 Madison Avenue, New York, NY, 10010 (Monthly: \$8.50 per year).

Balance Sheet. South-Western Publishing Co., 5101 Madison Road, Cincinnati, OH, 45227 (No charge).

Business Education Forum. National Business Education Association, 1906 Association Drive, Reston, VA, 22091 (Members, \$5; Non-members, \$2.50 per copy).

Business Education World. Gregg, McGraw-Hill Publishing Co., 1221 Avenue of the Americas, New York, NY, 10020 (No charge).

Collegiate News and Views. South-Western Publishing Co., 5101 Madison Road, Cincinnati, OH, 45227 (No charge).

Journal of Business Education. Heldref Publications, 4000 Albemarle Street, NW, Washington, DC, 20016 (Institutions, \$12; Individuals, \$8).

Modern Office Procedures. Industrial Publishing Company, 614 Superior Avenue, West, Cleveland, OH, 44113 (Monthly: \$18 per year).

Office. Office Publications, Incorporated, 1200 Summer Street, Stamford, CN, 06904 (Monthly: \$6 per year).

Office Supervisor's Bulletin. Bureau of Business Practice, 24 Rope Ferry Road, Waterford, CN, 06385 (Semi-monthly: \$15 per year). Newsletter containing articles and brief tips on office management.

Pam Says. Economic Press, Incorporated, 270 Pleasant Valley Way, West Orange, NJ, 07052 (Semi-monthly: \$10 per year). A training pamphlet for secretarial and clerical employees.

"Successful Supervisor: A Bulletin of Ideas and Inspiration for Those Who Manage People." Dartnell, 4660 Ravenswood Avenue, Chicago, IL, 60640.

"The Women's Executive Bulletin." Bureau of Business Practice, 24 Rope Ferry Road, Waterford, CN, 06386 (\$24 Year - Semi-annually).

"Women Today." Today Publications and News Services, Inc., National Press Building, Washington, DC, 20045.

3. Audio-Visual Aids

Instructors are encouraged to prepare audiovisual aids to meet objectives.

Utilize materials available from audiovisual companies and local businesses and industries.

4. Other Sources

Administrative Management Society, World Headquarters, Willow Grove, PA, 19090.

American Management Association, 135 West 50th Street, New York, NY, 10020.

Heyel, Carl (ed.). Handbook of Modern Office Management and Administrative Services. New York: McGraw-Hill Book Company, Current Edition.

Local, state and national business, office and management associations.

Standingford, Oliver. Simplifying Office Work. New York: Beekman Publishers, Incorporated, Current Edition.

SYLLABUS FOR
OFFICE PROCEDURES
(General Office/Secretarial)
BUSINESS 214

This syllabus was developed by R. Jean Overton, Department of Community Colleges and reviewed by the Secretarial Science Curriculum Advisory Committee.

Appreciation is expressed to the Advisory Committee for their assistance.

INTRODUCTION

The syllabus for Office Procedures is written in two parts: Part I - Basic Office Procedures provides information that all office workers should study. Part II - The Secretary's Career provides information specifically designed for secretaries.

Individuals in this course should have knowledge and skills in type-writing and office machines.

Utilize community resources in this course to make it more realistic for your students. This would include such things as providing opportunities for students to visit local offices, using secretaries, businesspeople, etc. as resource persons and class speakers, coordinating with local secretarial and office associations, etc.

Utilize commercial materials which contain objectives, activity experience such as simulations, word processing activities, case studies, etc.

There are many ways of presenting information and transmitting skills in the office procedures course. Some suggested instructional methods are: (1) lecture/discussion, (2) demonstration, (3) films/filmstrips, (4) field trips, (5) guest speakers, (6) case studies approach, (7) programmed learning materials, (8) learning activity packages, (9) audiotutorial approach and (10) job instruction sheets. The instructor should choose the method(s) that are most applicable to him/her and to the student.

This course is designed to give the student an overview of the types of operations performed in offices and to summarize the student's program of study in the area of office occupations.

BUSINESS 214 OFFICE PROCEDURES (General Office/Secretarial)

I. DESCRIPTION OF COURSE:

Designed to acquaint the student with the responsibilities encountered by an office worker in today's office. Some responsibilities discussed include: receptionist duties, handling the mail, telephone techniques, travel information, office records, purchasing of supplies, office organization and job applications.

II. COURSE OBJECTIVES:

Given the materials as presented in this course, the student will be able:

1. To demonstrate mastery of office duties such as handling mail, receiving office visitors, making appointments, transcribing, etc.
2. To demonstrate personal qualities essential to success on the job
3. To demonstrate proficiency in the operation and selection of various office machines
4. To demonstrate the proper procedures for applying for a job and describe some traits necessary for advancement on the job.

III. COURSE OVERVIEW:

- A. The office and the office worker
- B. The office image
- C. Basic office duties
- D. Information processing
- E. Special office duties
- F. Buying for the office
- G. Data processing
- H. Job entry and advancement
- I. A secretary's career
- J. Dictation and transcription
- K. Word processing center
- L. Reference sources and their uses

IV. CREDITS, HOURS, PREREQUISITES:

- A. Three-five (3-5) quarter hours credit
- B. Three-four (3-4) class hours; zero-two (0-2) laboratory hours per week
- C. Prerequisites: BUS 110, Office Machines; BUS 102, 103, Typewriting I, II or equivalent. Speed Requirement: 50 gross words per minute for five minutes with five or less errors.

V. EVALUATION:

Evaluation is based on the completion of stated objectives and should include one or more of the following: (1) objective- or discussion-type examination, (2) laboratory assignments, (3) project and/or (4) case studies.

PART I
BASIC OFFICE PROCEDURES

Competency	Content Outline	Activity Experience	Evaluation
A. To be able to define office.	I. The Office and the Office Worker A. Office Defined 1. Webster - A place where a particular kind of business is transacted or a service is supplied. 2. A place where functions of an organization, enterprise, public officer or professional person are performed (consulting, recordkeeping, clerical work).	A. Lecture/Discussion	I. Given an objective-type test the student will be able to identify the purposes and functions of the modern office and office worker.
B. To be able to discuss the principles, practices and procedures of the modern office.	B. Principles, practices and procedures of the modern office.	B. Lecture/Discussion Invite a local businessperson or office worker as a class speaker. Have students visit a local office and interview the personnel and prepare a written or oral report for the class about the modern office.	
C-1. To be able to identify the types of offices.	C. Business offices 1. Types of offices a. Government b. Public utility (1) Telephone (2) Electric (3) Other c. Manufacturing d. Financial institution (1) Bank (2) Mortgage (3) Savings and loan (4) Other e. Other	C. Lecture/Discussion Have a panel of various types of office personnel visit the class to describe the functions of their office.	

Competency	Content Outline	Activity Experience	Evaluation
C-2. To be able to identify various office sizes.	2. Size of office a. Large, medium, small b. Number of employees		
D. To be able to identify technological changes, effective job titles and descriptions.	D. Office position 1. Job titles and descriptions 2. Job availability - supply and demand 3. Technological changes	D. Lecture/Discussion D-1. Obtain various job descriptions for discussion in class. D-1-3. Plan a visit to a personnel office. D-1-3. Have a personnel officer as a class speaker.	
E. To be able to identify the duties and work habits of an office worker.	E. Duties and work habits of office workers 1. Work habits 2. Job performance 3. Personal qualifications	E. Lecture/Discussion Have office worker visit the class to explain qualifications and work habits. Use personnel officer as explained in D-1-3.	E. Role playing - demonstrate work habits.
F. To be able to plan furnishing for an office.	F. Furnishing an office 1. Equipment a. Typewriters (1) Types (2) Selection (a) Use (b) Service (c) Cost b. Adding machines (1) Full-keyboard (2) Ten-key c. Calculators (1) Printing (2) Rotary (3) Key-driven (4) Electronic d. Dictating/transcribing equipment e. Duplicating equipment	F. Lecture/Discussion Demonstration of equipment Obtain brochures from local businesses on various types and brands of equipment. Have local businesspersons give a machines show. Student surveys of equipment used by local offices. Plan visit to local offices for students (field trip). Plan an office layout.	F. Have students prepare a project on furnishing an office (arrangement of furniture, supplies, equipment, etc.)

Competency

Content Outline

Activity Experience

Evaluation

- f. Accessories
 - (1) Copyholder
 - (2) Binding machine
 - (3) Collator
 - (4) Other (used in local offices)
- 2. Furniture
 - a. Desks
 - b. Chairs
 - c. Bookcases
 - d. Files
 - e. Storage cabinets
- 3. Stationery and supplies
 - a. Paper (duplicating and other)
 - (1) Finish
 - (2) Color
 - (3) Quality
 - (4) Weight
 - b. Letterheads
 - c. Business forms
 - d. Carbon paper and packs
 - e. Typewriter ribbons
 - f. Miscellaneous office supplies

F-3. Obtain various types of stationery and supplies for examination by students.

F-3. Have students collect samples of stationery, supplies, letterheads and office forms for a class demonstration.

II. This section contains topics including personality traits, personal appearance, business behavior and human relations. Information for this topic should be presented in a human relations-type course and is provided here for review only. This unit could be omitted.

To be able to analyze and discuss the effect of personal appearance and behavior patterns on job success.

II. The Office Image

- A. Wardrobe and grooming
- B. Voice and speech
- C. Business behavior
 - 1. Personality
 - 2. Etiquette
 - 3. Ethics

II. Activities for this unit should be primarily demonstration, role-playing, professional and field trip types of activities.

Administer personal rating evaluation.

Film/filmstrips.

II. Given oral- and written-type cases, the student will be able to analyze the cases in terms of the "perfect" office image.

Competency	Content Outline	Activity Experience	Evaluation
	III. Basic Office Duties		
A. To be able to demonstrate the use of proper telephone techniques.	A. Telephone Procedures 1. Voice qualities and importance of voice 2. Using the telephone correctly a. Incoming calls b. Outgoing calls c. Screening calls 3. Using telephone directories a. Alphabetical directory b. Yellow pages directory c. Personal telephone directory 4. Telephone equipment and services a. Equipment (1) PBX console (2) Call director (3) Multi-button desk telephone (4) Telephone answering device (5) DATA-PHONE service (6) SPEAKERPHONE (7) PICTURE PHONE (8) Other b. Services (1) Answering service (2) Taped announcements (3) Station-to-station calls (4) Person-to-person calls (5) Direct Distance Dialing (6) Collect calls (7) Telephone credit calls	Have students record voices and discuss their quality. Use a teletrainer for demonstration of incoming and outgoing calls emphasizing the proper techniques and the do's and don't's. Role playing will be good exercise to demonstrate the handling of problem callers, screening callers and recording telephone messages. Have local telephone office representative visit class to discuss and demonstrate various telephone services and equipment available. Discussion/Demonstration	A. Given an oral exercise on the teletrainer or a role playing exercise, the student will demonstrate proper telephone techniques.

Competency

Content Outline

Activity Experience

Evaluation

	(8) Wide area telephone service (WATS) (9) Extended area service (EAS) (10) Conference calls (11) Mobile service		
B. Many of these concepts should be covered in typewriting courses and will be presented in this course as review.	B. Typing Procedures		
B-1. To be able to proof and make corrections on typewritten communications.	1. Proofreading a. Making corrections b. Spreading and squeezing letters 2. Business correspondence a. Letter styles b. Special notations in correspondence c. Interoffice communication d. Envelopes and cards e. Labels f. Completion of forms and form letters g. Legal papers and procedures (particularly contracts and power of attorney) h. News releases i. Composing letters j. Preparing business reports k. Tables and figures	B-1. Typewriting exercises in proofreading. Emphasis on the importance of proofreading. B-2. Exercise typing various types of business correspondence. Use of business personnel to discuss special types of correspondence.	B-1. Given the appropriate materials and information the student will be able to make corrections. B-2. Given the appropriate information the student will be able to type various types of correspondence.

Competency	Content Outline	Activity Experience	Evaluation
C. To be able to type and handle materials for reproduction.	C. Reprographics 1. Typing materials for reproduction a. Masters b. Stencils c. Off-set 2. Copying Machines	C. Demonstration Collect various types of reproduction materials and information on reproducing equipment.	C. Given the appropriate information, the student will be able to type and reproduce a letter with enclosures.
D. To be able to plan work in the office.	D. Work planning 1. Organization of work area 2. Daily work 3. Establishing and determining priorities 4. Using slack periods effectively	D. Lecture/Discussion Simulated activities in establishing priorities.	D. Given the appropriate information, the student will be able to plan work in an office for a week.
12	IV. Information Processing		
A-1. To be able to process incoming mail.	A. Mail handling 1. Processing incoming mail a. Sorting b. Opening (1) Date/time stamper (2) Routing c. Routing d. Processing mail during employer's absence	VI.-A. Discussion/Demonstration Obtain post office pamphlets on mail. Field trip to post office and/or business using automatic mailing device. Invite postal employee to class. Student demonstration of handling incoming and outgoing mail.	VI.-A. Given the appropriate information, the student will demonstrate techniques for handling various mail situations (incoming/outgoing).

Competency

Content Outline

Activity Experience

Evaluation

A-2. To be able to process outgoing mail.

2. Outgoing mail and shipping service
 - a. Postal regulations and procedures
 - (1) Sources of information
 - (2) Classes of mail
 - (a) First class
 - (b) Second class
 - (c) Third class
 - (d) Fourth class (parcel post)
 - (e) Special rates
 - (3) Special mail services
 - (a) Airmail/air parcel post
 - (b) Registered mail
 - (c) Certified mail
 - (d) Insured mail
 - (e) Special delivery
 - (f) C.O.D. mailing
 - b. Shipping services
 - (1) Rail express (REA)
 - (2) Air express
 - (3) Bus express
 - (4) Air freight
 - (5) Motor (truck) freight
 - (6) Bill of lading
 - c. Collection processes
 - d. Bulk mailing methods

B. To be able to explain the purpose, application and importance of an effective filing system.

- B. Filing systems and techniques
 1. Purpose of filing
 2. Standard filing equipment and supplies
 3. Filing procedures

B. Utilize textbook and/or instructor prepared projects.

Tour businesses having various types of filing systems.

Complete a practice set.

B. Given the appropriate information, the student will apply filing rules, procedures and systems.

Competency

Content Outline

Activity Experience

Evaluation

- a. Alphabetic indexing rules and application
- b. Filing procedures
 - (1) Inspecting
 - (2) Indexing
 - (3) Coding
 - (4) Cross-referencing
 - (5) Sorting
 - (6) Filing
 - (7) Finding
 - (8) Charging
 - (9) Transferring
 - (10) Following-up
- c. Filing systems
 - (1) Alphabetic
 - (2) Numeric
 - (3) Geographic
 - (4) Subject
 - (5) Special commercial systems
 - (6) Microfilm/microfiche
 - (7) Magnetic tape
 - (8) Other
- d. Retention of files

- V-A. To be able to compare and contrast the various modes of travel and methods for paying.
- To be able to make and plan travel arrangements (reservations, itineraries, folders)

- V. Special Office Duties
- A. Travel arrangements and services
 - 1. Preliminary planning
 - a. Assembling a trip folder
 - b. Transportation arrangements
 - 2. Travel accommodations
 - a. Air
 - b. Train
 - c. Bus
 - d. Automobile

- V-A. Demonstration
Role playing
- Have travel agency representative discuss travel and trip planning.
- Have students plan and prepare hypothetical trip (itinerary, reservations, folders)
- Use role playing to practice making travel or accommodation reservations.
- Discuss marked travel map (may obtain from any oil company or American Automobile Association).

- V-A. Given the appropriate information, the student will be able to plan and prepare a travel plan.
- or
- Student reports on various modes of travel.

Competency

Content Outline

Activity Experience

Evaluation

9. To be able to analyze the importance of keeping accurate financial records.

To be able to complete various financial forms (purchase order, expense report, petty cash funds, etc.)

To be able to prepare bank deposits and reconcile a bank statement.

- C. To be able to describe the procedures for planning an interoffice and a formal meeting.

3. Other arrangements
a. Hotel/motel reservations
b. Travel funds/credit cards
c. Expense accounts

- B. Financial records
1. Financial statements and their uses
a. Profit and loss
b. Balance sheet
2. Budgets
3. Petty cash records
4. Expense reports
5. Payroll records
6. Income tax returns
7. Banking activities
8. Investments, insurance and real estate

- C. Planning meetings and conferences
1. Interoffice meetings
a. Arrangements
b. Preparing meeting room
c. Follow-up reports and letters
2. Formal meetings
a. Meeting notices
b. Agenda for meeting
c. Registration procedures
d. Minutes and follow-up letters

- B. Demonstration/problem-solving activities

Plan a field trip to a business to observe a payroll machine.

Invite local employee to discuss payroll procedures.

Assign problems on using tax tables, preparing payroll records, reconcile bank statements, preparing purchase orders, invoices, etc.

- C. Discussion/problem-solving activities

Case study
Role playing

- B. Given the appropriate information, the student will be able to complete various financial statements and/or reconcile a bank statement.

- C. Given an objective- or discussion-type test, the student will be able to describe procedures for planning meetings and conferences either interoffice or formal.

Competency

Content Outline

Activity Experience

Evaluation

VI. To demonstrate tact in dealing with office visitors.

VI. Public Relations

A. Receiving office visitors

1. Appointments

- a. Greeting callers
- b. Managing details
- c. Informing employer about visitor
- d. Escorting to office

2. Handling emergencies

- a. Dealing with long wait
- b. Making another appointment
- c. Cancelling an appointment

3. Interrupting a meeting

- a. Using intercom
- b. Discreet notification

4. Unexpected callers

- a. Obtaining information
 - (1) Affiliation
 - (2) Purpose of call
- b. Making judgments

B. Managing appointments

- 1. Maintaining desk calendar
- 2. Keeping caller's register or log

C. Family and friends

VI. Role playing to practice receiving office visitors.

Have students interview a receptionist in a local business.

Have an office receptionist visit the class to discuss duties.

Have students complete personality rating chart.

VI. Given a role playing situation, the student will be able to demonstrate tact in dealing with office visitors.

Competency	Content Outline	Activity Experience	Evaluation
VII. To be able to complete the necessary procedures for buying equipment and supplies for the office. B. To be able to prepare purchase requisitions and purchase orders. F. To be able to identify various credit instruments. G. To be able to identify shipping terms and discounts.	VII. Buying for the Office A. Large and small companies B. Purchase requisition and purchase order C. Order by telephone D. Order by letter E. Selling in the office F. Credit instruments 1. Drafts 2. Trade acceptance 3. Promissory note G. Shipping terms and discount 1. f.o.b. destination 2. f.o.b. shipping point 3. Collect 4. Net 30 or net 60 5. Trade discounts 6. Cash discounts	VII. Demonstration Lecture/discussion Problem-solving Case study Obtain various forms used in buying from business offices. Role playing exercises in ordering by telephone.	VII. Given the appropriate information, the student will be able to complete the procedures for buying supplies for the office.
VIII. To be able to identify data processing terms. To be able to apply the principles of automation to business systems.	VIII. Data Processing and the Office Worker A. Growth and importance 1. History 2. Interrelationship of people and automation B. Business application 1. Explanation 2. Case illustration	VIII. Lecture/discussion Field trips to data processing installation. Guest speakers from data processing installation. Have students collect articles or other information on data processing - may be project or class discussion. Obtain brochures and other information on data processing equipment from manufacturers and distributors.	VIII. Given an objective-type test, the student will be able to identify data processing terms and apply the principles of automation to business systems.

Competency	Content Outline	Activity Experience	Evaluation
	C. Elements basic to data processing function 1. Origination (source document) 2. Input 3. Manipulation 4. Output (communicating) 5. Storage (retrieving) D. Electronic computer systems 1. Types of computers a. Analog b. Digital 2. Components a. Input b. Memory c. Control d. Arithmetic e. Output 3. Language systems a. Common business oriented language (COBOL) - Business b. Formular translation (FORTRAN) - scientific c. Report program generator (RPG) - Business d. Symbolic program system (SPS) - Business 4. Companies in the field a. International Business Machines (IBM) b. Burroughs Corporation c. General Electric d. General Dynamics e. Friden f. National Cash Register g. Radio Corporation of America (RCA) h. Honeywell i. Remington Rand (UNIVAC)	Obtain business forms illustrating data processing input devices and output devices.	

Competency	Content Outline	Activity Experience	Evaluation
A. To be able to analyze personal qualifications, knowledges and skills necessary for employment. To be able to compare and contrast the factors one should consider when selecting and applying for a job. B. To identify some means for locating job vacancies. C. To be able to compare and contrast salary and other factors relevant to a job.	IX. Job Entry and Advancement A. Individual qualifications and preferences 1. Self-evaluation 2. Selecting job B. Job sources 1. Employment agencies a. Public b. Private 2. Newspaper advertisements a. Blind ads b. Signed ads 3. Placement offices in educational institutions 4. Government employment a. Procedure for applying b. Employment policies and codes c. Advantages and disadvantages 5. Friends and relatives C. Compensation 1. Salary range 2. Deductions 3. Fringe benefits 4. Overtime policies 5. Group insurance 6. Wage and hour law 7. Standard work week 8. Holidays and vacations 9. Petty leave and sick leave 10. Compensated education program 11. Promotional opportunities	IX. Discussion Case study Role playing Films/Filmstrips Have counselor administer aptitude test and explain placement office. Have employment security representative administer employment test. Prepare, discuss and examine application letters, application forms and personal data sheets. Prepare and demonstrate role playing activities for job interview. Show filmstrip illustrating proper interview techniques. Tape interview sessions and play back for discussion and critical analysis. Invite civil service representative to class to discuss job openings and procedures for applying. Administer civil service examination. Have employer from business to discuss pros and cons of employee activities.	IX. Have each student select a job opening (from classified advertisement or other sources) in line with personal qualifications and complete the following assignments: a. Application letter b. Personal data sheet c. Samples of work d. Completed application blank

Competency	Content Outline	Activity Experience	Evaluation
D. To be able to complete an application form, compose an application letter and prepare a personal data sheet. E. To be able to demonstrate the proper procedures for an interview. F. To be able to relate the importance of the job to you and the company. To be able to identify opportunities for continued learning and advancement on the job.	D. Job applications 1. Application letter and personal data sheet 2. Application forms 3. Telephoning for interview appointment E. The job interview 1. Preparation for interview a. Supplies and work samples b. Certification of proficiency c. Prior knowledge of location and parking facilities d. Transportation - report for interview alone 2. Dress and attitude 3. Employment tests 4. Terminating the interview 5. Follow-up letter (thank you letter for interview) F. Advancement on the job 1. Responsibility and loyalty 2. Initiative 3. Self-improvement (continuing education) 4. Relationship with co-workers 5. Promotional possibilities within the company 6. Advancement possibilities with another company		

PART 2
SPECIAL SECRETARIAL PROCEDURES

Competency	Content Outline	Activity Experience	Evaluation
I. To be able to identify some of the duties and responsibilities of a secretary. To be able to identify the skills a secretary must possess.	I. A Secretary's Career A. Secretary defined B. Role of the secretary C. Career choices 1. Private secretary 2. Office secretary 3. Executive secretary 4. Government secretary 5. Public stenographer 6. Medical secretary 7. Legal secretary 8. Technical secretary 9. Corporation secretary D. Training of a secretary 1. Skill training 2. Understanding of business practices and organization 3. Human relations techniques	I. Lecture/discussion Develop several definitions of a secretary. Have students compile information on a secretarial career choice and present an oral presentation. Have a secretary visit the class and explain his/her duties and responsibilities on the job. Have local secretarial association representative attend class and explain the association.	I. Given an objective-type test, the student will be able to identify the role of the secretary in the office and the training needed by a secretary.
II. To be able to take dictation professionally. To be able to give dictation. To be able to transcribe effectively and efficiently. To be able to proofread with accuracy. This unit will also be applicable to general office workers.	II. Dictation and Transcription A. Office standards B. Taking dictation 1. Dictation supplies a. Stenographer's notebook b. Pen c. Pointed red pencil (color) d. File folder e. Rubber finger pad	II. Problem-solving Discussion Have local business representative demonstrate transcription equipment. Visit a local office and study the processes used in dictation and transcribing.	II. Given two letters by verbal dictation and two letters by machine dictation, the student will be able to transcribe mailable copies.

Competency

Content Outline

Activity Experience

Evaluation

III. To be able to describe
the word processing concept.

III. Word Processing Center

- A. Word processing concept
- B. Administrative secretary
- C. Correspondence secretary
- D. Methods and procedures
in center
- E. Office organization and
planning
- F. Word processing manual

III. Lecture/discussion
Films/filmstrips
Visit a local business
having a word processing
center.

Have a business represen-
tative visit the class and
explain the operations of
the word processing center.

Have students read periodicals
on word processing.

III. Given a discussion-type test,
the student will be able to
describe the word processing
concept.

Competency

Content Outline

Activity Experience

Evaluation

IV. To be able to identify and use various reference sources used in the office.

To be able to effectively use the library.

IV. Reference Sources and Their Uses

- A. Basic reference sources
1. Secretarial handbook
 2. Dictionary
 3. Telephone directory

B. Other reference sources

1. Hotel Red Book
2. Postal Manual and National Zip Code Directory
3. City directories or inter-office directories
4. Thesaurus

C. Using the library

D. Professional associations and periodicals

IV. Lecture/discussion
Problem-solving activities using reference sources. Obtain various reference sources used by secretaries and discuss in class.

Have postal representatives visit class and explain Postal Manual and Zip Code Directory.

Have students demonstrate use of various reference sources.

Plan projects utilizing the student's use of library.

IV. Given a problem or case study, the student will demonstrate the proper use of reference sources and use of the library.

BIBLIOGRAPHY

1. Books

- Anderson, Ruth I. and others. The Administrative Secretary: Resource. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.
- Atkinson, Phillip S. Medical Office Practice. Cincinnati: South-Western Publishing Co., Current Edition.
- Bate, Marjorie Dunlap and Mary C. Casey. Legal Office Procedures. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.
- Bredow, Miriam. Medical Office Procedures. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.
- Hanna, J. Marshall and others. Secretarial Procedures and Administration. Cincinnati: Southwestern Publishing Co., Current Edition. (Simulated Office Situations available also)
- Lee, Dorothy E. and Walter A. Brower. Secretarial Office Procedures. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.
- Moon, Harry R. Office Procedures. Bronx, New York: Milady Publishing Corp., Current Edition.
- Namanny, Dorothy S. and Garland C. DuPree. Legal Office Procedures. Cincinnati: South-Western Publishing Co., Current Edition.
- Place, Irene and others. College Secretarial Procedures. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.
- Woodard, Theodore and others. General Office Procedures for Colleges. Cincinnati: South-Western Publishing Co., Current Edition.
- Woodard, Theodore and others. Secretarial Office Procedures for Colleges. Cincinnati: South-Western Publishing Co., Current Edition.

2. Periodicals

Balance Sheet
Business Education Forum
Business Education World
Journal of Business Education
Viewpoints in Business and Office Education
Word Processing
Word Processing Report
Word Processing World
Publications from Office and Secretarial Associations

3. Audio-Visual Aids

Instructors are encouraged to prepare audio-visual aids to meet objectives of units.

Films and filmstrips available from audiovisual companies and local businesses and associations.

4. Other Sources

Bredow, Miriam. Handbook for the Medical Secretary. Gregg Division, McGraw-Hill Book Company, Current Edition.

Copeland, Amanda. A Teacher-Student Handbook for More Individualized Training in Business and Office Education. Little Rock, Arkansas: Department of Education, 1973.

Doris, Lillian and Besse May Miller. Complete Secretary's Handbook. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.

Gavin, Ruth E. and William A. Sabin. Reference Manual for Stenographers and Typists. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.

Hutchinson, Lois. Standard Handbook for Secretaries. New York: McGraw-Hill Book Company, Current Edition.

Leslie, Louis A. and Kenneth B. Coffin. Handbook for the Legal Secretary. Gregg Division, McGraw-Hill Book Company, Current Edition.

Leslie, Louis A. Twenty-Thousand Words. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.

Silverthorn, J.E. Word Division Manual. Cincinnati: South-Western Publishing Company, Current Edition.

Strongy, Madeline and others. The Secretary at Work. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.

Wood, Merle and Margaret McKenna. The Receptionist: A Practical Course in Office Reception. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.

Manual for Uses: Clerical Skills Test. Superintendent of Documents, US Government Printing Office, Washington, DC, 20402. (Published by US Department of Labor, 40 cents for March, 1968 edition)

National Business Education Association Yearbooks.

The New American Roget's College Thesaurus in Dictionary Form. New York: The New American Library, Inc., Current Edition.

Other Sources (continued)

Office Simulation - Integrated Projects for Clerical Office Practice.
Student Manuals and Teacher Manuals and Copies for Overhead Transparencies. Developed by Department of Business Education, University of Southern Mississippi. Order from: Curriculum Coordinating Unit, P. O. Box DX, State College, MS, 39762.

"A Secretary's Day at Lenox, Inc. Student and Teacher Materials.
Published by Lenox, Trenton, NJ, 08605.

"The Successful Secretary." School Department, Royal Office Typewriters, Division of Litton Industries, 150 New Park Avenue, Hartford, CT, 06106.

Training Materials for Cutting Office Costs Through Work Simplifications.
(Programmed Course) Argyle Publishing Company, 200 Madison Avenue, New York, NY, 10016.

Telephone Directories

Webster's Dictionary

World Almanac

Local secretary or office association [National Secretaries Association (International)]

Educational Office Personnel Association

Available from Program Development Division, Department of Community Colleges, Education Building, Raleigh, NC, 27611.

"Business Occupations Programs: Resource List of Individualized Instruction Materials"

"The Implementation of Word Processing in the Business Curriculum of Nash Technical Institute"

Office-Simulated Activities

"Personal Finance"

Pitt Technical Institute Survey of Office Occupations

"Related Instruction Project: How to Prepare Task Simulations"

Task Simulations

APPENDIX

WHAT IS A SECRETARY?

Dictionary of Occupational Titles

A secretary is a person who

1. schedules appointments
2. gives information to callers
3. takes dictation
4. relieves officials of clerical work and minor administrative and business details
5. reads and routes incoming mail
6. locates and attaches appropriate file to correspondence to be answered by employer
7. Takes dictation in shorthand or on machine and transcribes notes on typewriter or transcribes from voice recording
8. composes and types routine correspondence
9. files correspondence and other records
10. greets visitors, ascertains nature of business and conducts visitors to employer or appropriate person
11. may not take dictation
12. may arrange travel schedule and reservations
13. may compile and type statistical reports
14. may keep personal records
15. may record minutes of staff meetings.

Occupational Outlook Handbook

In addition to stenographic duties the secretary usually handles a variety of business details on his/her own initiative:

1. represents her employer to the public and to other business people
2. responsible for relieving his/her boss of routine duties
3. responsible for supervising clerical workers
4. responsible for handling correspondence
5. responsible for recording highly confidential materials.

National Secretaries Association (International)

A secretary shall be defined as an assistant to an executive, possessing mastery of office skills and ability to assume responsibility without direct supervision, who displays initiative, exercises judgment, and makes decisions within the scope of his/her authority.

Educational Secretary

This secretary performs the usual secretarial tasks and in addition:

1. prepares class schedules and attendance reports
2. types transcripts of grades

Education Secretary (continued)

3. orders books, equipment, supplies and printing
4. keeps personnel records of the faculty and administrative staff
5. handles all needed repairs and service calls
6. may maintain payroll records for all system personnel
7. often handles inquiries and requests from parents
8. arranges for use of school facilities by community groups
9. works on annual budgets
10. may even have charge of bids and letting of contracts for new construction
11. in small school: may act as cashier in cafeteria or at athletic events and serve as "money changer" for students
12. important public relations position.

Legal secretary

The Legal secretary needs a thorough general education background (knowledge of Latin would be useful). This person needs topnotch secretarial skills (shorthand; 100-140 wpm, typing; 60-80 wpm, transcription rate; 30 wpm often required). Other requirements include:

1. takes dictation and often transcribes from voice machines
2. understanding of law
3. familiarity with legal matters such as pleadings, subpoenas and deeds
4. ability to prepare common legal papers, such as wills, deeds, titles, abstracts and briefs
5. may serve as receptionist
6. make appointments for clients
7. notarize papers
8. may be given considerable responsibility in the management of law practice in a small office or partnership
9. ability to keep accurate control of his/her employer's court calendar and the vital dates connected with each client's legal proceedings
10. should never attempt to offer counsel or advice or try to perform any kind of service that departs from routine business procedure

Medical Secretary

In addition to regular secretarial duties, the medical secretary may be expected to

1. complete insurance forms involving hospitalization benefits
2. determine charges for routine medical services
3. make appointments for patients with other physicians
4. reorder medical supplies and drugs
5. arrange with hospitals for admission of patients
6. arrange special terms of payment with patients when necessary
7. transcribe case histories and records of patients
8. gather material from medical records for use in court

Semitechnical Duties

9. obtain personal data from patients
10. take temperatures and pulse rates
11. prepare patients for examination
12. sterilize instruments and dressings
13. replenish supplies in doctor's bag for emergency and house calls

HOW DO YOU MEASURE UP? *

	Possible Points	Your Score
1. Can you type accurately? (Three or fewer corrections on a page)	10	
2. Can you type at a rapid rate? (60 wpm or better)	10	
3. Can you arrange attractively the following materials on the page:		
Letters?	4	
Monthly Reports?	4	
Manuscript Material?	4	
4. Do you proofread your work carefully?	15	
5. Can you divide words correctly?	5	
6. Can you make neat, unnoticed erasures?	10	
7. Can you change a typewriter ribbon quickly?	5	
8. Do you keep your typewriter clean and in good repair?	5	
9. Can you take dictation comfortably at a reasonable rate?	10	
10. Can you transcribe your dictation notes accurately? (Mailable transcripts the first time!) and in a reasonable length of time?	10 5	
11. From your dictation notes, can you visualize the length and appropriate format of a letter?	5	
12. Can you transcribe mailable, sensible letters from your dictation notes if words have been omitted or if for some other reason your notes are not readable?	10	
13. If necessary, can you do statistical typing?	5	
14. Can you file accurately and find papers quickly?	10	
15. Are you skillful, courteous, and efficient at placing and receiving telephone calls in a way that is a credit		
to you?	4	
to your boss?	4	
to the school or department in which you work?	4	
16. Can you set up and maintain an effective filing system?	10	
17. Do you understand and follow the established policies for preparing materials for duplicating and printing?	5	
Can you operate reasonably well computing machines such as adding machines and calculators?	5	

*Source unknown.

19. Can you compose clear, concise, courteous, complete, correct, and concrete business letters?	10	
20. Do you know the primary sources of information available to secretaries?	10	
21. Are you up to date on letter writing trends?	4	
office supplies?	3	
22. Do you thoroughly understand the procedures for procurement and use of supplies and equipment?	5	
23. Can you keep simple financial records such as the following:		
postal expenses?	3	
printing expenses?	3	
travel expenses?	3	
24. Can you handle skillfully the details of travel for your boss?	4	
25. Are you so conscientious that you will stick to a job until it is not only done, but well done?	10	
26. Have you a fund of energy that keeps you alert and alive right up to the end of the day?	5	
27. Are you methodical in your work habits?	3	
28. Are you careful about your personal appearance?	5	
29. Do you adjust easily to a new situation?	5	
30. Have you a sense of humor?	10	
31. Can you follow directions?	10	
32. Are you able and willing to take responsibility?	10	
33. Is your knowledge of grammar, spelling, and punctuation up to trigger-quick perfection?	15	
34. Do you have efficient work habits?	5	
35. Do you answer the telephone promptly and pleasantly, with an identifying phrase?	15	
36. Do you keep pad and pencil ready for taking messages?	10	
37. Do you make all necessary notations about names, places, and specifications?	10	
38. Before making telephone calls, do you make notes to avoid delays, omissions, and embarrassing call-backs?	5	

39. Do you double-check figures and amounts quoted in letters or reports?
40. When sorting mail, do you put urgent letters on top, less important correspondence and circulars on the bottom?
41. Do you attach previous correspondence to help the boss frame his/her reply?
42. Are you familiar with postal rates and regulations?
43. Do you know how to obtain Zip Codes quickly?
44. Can you collate and staple papers speedily?
45. Do you keep an index of frequently called numbers?
46. Do you take accurate telephone messages and relay them as soon as possible?
47. Are you a good housekeeper in the office?
48. Are you familiar with the latest kinds of business machines and what they can do?
49. Can you figure discounts, percentages, and fractions?
50. Do you recognize emergencies?

Possible Points	Your Score
10	
5	
5	
3	
3	
3	
10	
10	
10	
6	
5	
10	

HOW DO YOU RATE?

If your score is--

- 380-400 You're "tops"
- 359-379 A good "worker"
- 338-358 Are you willing to be just average?
- Below 338 Get busy on a "job training" plan!

A SELF-ANALYSIS CHART FOR RATING YOUR OWN SECRETARIAL PERSONALITY COMPONENTS *

DIRECTIONS: Answer each question honestly and sincerely by placing a check mark in the appropriate column at the right. Be sure to base your rating on some past experience or an applicable incident.

	Never	Some- times	Always
ACCURACY: <u>To what extent do I--</u>			
1. Carefully do each detail of work?	_____	_____	_____
2. Carefully check each detail for correctness?	_____	_____	_____
3. Carefully correct each error?	_____	_____	_____
4. Carefully recheck each correction?	_____	_____	_____
GOOD JUDGMENT: <u>To what extent do I--</u>			
5. Concentrate on the work at hand?	_____	_____	_____
6. See in my work things to be changed, needs for action?	_____	_____	_____
7. Analyze the factors of those situations requiring action?	_____	_____	_____
8. Take the appropriate actions?	_____	_____	_____
9. Take the appropriate actions at the proper time?	_____	_____	_____
FOLLOW-THROUGH: <u>To what extent do I--</u>			
10. Carry out requests that are implied but not put into words?	_____	_____	_____
11. Carry out completely the worded requests, orders, and assignments?	_____	_____	_____
12. Carry out worded requests within the proper time?	_____	_____	_____
RESOURCEFULNESS: <u>To what extent do I--</u>			
13. Think positively; know that there is a way to accomplishment?	_____	_____	_____
14. Think of, and try, likely possibilities?	_____	_____	_____
15. Think of, and try, unlikely possibilities?	_____	_____	_____
16. Continue thinking and trying until successful?	_____	_____	_____
INITIATIVE: <u>To what extent (without being told) do I--</u>			
17. See another's needs?	_____	_____	_____
18. Fill those needs?	_____	_____	_____
19. Take tentative action for another when there is need?	_____	_____	_____
20. Make tentative decisions for another when there is need?	_____	_____	_____
CONSIDERATION: <u>To what extent do I--</u>			
21. See that another gets the best, and I the second-best?	_____	_____	_____
22. Take advantage of opportunities to help others?	_____	_____	_____
23. Do kindly things, without being asked?	_____	_____	_____
24. Express sympathy orally or tangibly?	_____	_____	_____

*Source unknown.

TACT: To what extent do I--

- | | <u>Never</u> | <u>Some-
Times</u> | <u>Always</u> |
|--|--------------|------------------------|---------------|
| 25. Phrase questions so as to preclude embarrassing answers? | _____ | _____ | _____ |
| 26. Ask, instead of order, demand, command? | _____ | _____ | _____ |
| 27. Phrase reminders as questions? | _____ | _____ | _____ |
| 28. Take immediate, undue blame to prevent an emotional situation? | _____ | _____ | _____ |
| 29. Say nothing in hard-to-resist, I-told-you-so situations? | _____ | _____ | _____ |
| 30. Say nothing to a person about his/her mistakes and failures? | _____ | _____ | _____ |
| 31. Pretend not to have overheard or seen when I should not have? | _____ | _____ | _____ |

DISCRETION: To what extent do I refrain from divulging--

- | | | | |
|---|-------|-------|-------|
| 32. Business and personal facts about fellow-workers? | _____ | _____ | _____ |
|---|-------|-------|-------|

LOYALTY: To what extent do I--

- | | | | |
|---|-------|-------|-------|
| 33. Refrain from disparaging the person's capacities? | _____ | _____ | _____ |
| 34. Orally support the person's action before others? | _____ | _____ | _____ |
| 35. Orally commend rather than belittle the person? | _____ | _____ | _____ |

OBJECTIVITY: To what extent do I--

- | | | | |
|--|-------|-------|-------|
| 36. Look at personal situations impersonally? | _____ | _____ | _____ |
| 37. Analyze personal situations into intellectual factors? | _____ | _____ | _____ |
| 38. Turn criticism into constructive guidance? | _____ | _____ | _____ |
| 39. Treat failures as good experience for future guidance? | _____ | _____ | _____ |
| 40. Refuse to let unchangeable situations annoy me? | _____ | _____ | _____ |

38

BUS 214

319

320

GETTING ALONG IN THE OFFICE

No matter how you earn a living, one occupational skill you'd do well to cultivate is a knack for getting along with the boss--that dispenser of raises and promotions and probably the key person in your working life. In most places it's your boss's opinion of you that determines your future in the business or industry. A worker in constant conflict with the supervisor, even if the person is a virtuoso performer on the job, can find the prospects considerably dimmed.

What can you do to get into the boss's good graces and stay there? Fortunately, most bosses aren't ogres, so they respond to efforts to improve relationships with them. Here are suggestions for making yourself more valuable to the man or woman you work for, based on the observations of managers and job counselors.

Help the boss do the job. You accomplish this by doing your job as best you can. An obvious piece of advice? Perhaps, but it's probably the most frequently forgotten. Keep in mind *how your job ties in with your boss's*. He/she is responsible for seeing that a certain set of tasks is accomplished, be it writing insurance policies or other materials, assembling machine parts or selling merchandise. Your job is to tend to some detail of the task to be done. The better you hold up your end, the easier the boss's job is, which is bound to make him/her look more kindly on you.

Get to know his/her standards. Your performance is judged by them. By noting your boss's reaction to different ways things are done, you learn what's especially important to him/her. For example, a secretary who prides himself/herself on his/her shorthand and typing speed may be surprised to find himself/herself passed up for a promotion if he/she ignores his/her boss's frequent complaints about his/her spelling errors. Likewise, a super salesperson whose supervisor has to remind him/her constantly to turn in his/her sales reports on time may not be considered when it comes time to pick a new sales manager for his/her territory. If you were a boss, would you promote someone *who has to be hounded again and again about the same old mistakes or shortcomings?*

The smart worker gets to know his/her boss's personal set of dos and don'ts and avoids violating them as much as possible. Where the rules seem silly, try doing things that way for at least a while. If you just can't adapt, you may have a boss you don't want to get along with.

Keep him/her informed. When the boss gives you an assignment, especially a long-term one, he/she will want to be kept informed about how you're coming along. You can keep him/her up-to-date with short memos now and then or by mentioning your progress during informal conversations with him/her. If it's a complicated report, better put it in writing. Especially if you work with relatively little supervision,

it's a good idea to let your supervisor know periodically what you're doing. Tell him/her about ideas you may get for streamlining the way you do your job (not the way he/she does his/hers) only if you've carefully thought them through and can explain them clearly.

Don't take too much of his/her time. Spare the boss the details of your weekend camping trip unless he/she expresses a definite interest. There's a time and place for swapping stories and if your boss wants to pass some time that way, he/she will take the initiative.

Be careful also about bending his/her ear every time a minor problem comes up in the shop or office. True, he/she is there to help solve problems, but you can often find the answer without bothering him/her. You want the boss to notice you for the problems you solve, not the ones you toss in his/her lap.

Be reliable. Get to work on time. Finish your assignments when you're supposed to finish them. Show the boss that when he/she needs something done in a hurry, you're the one who'll give it the extra effort needed. If he/she knows he/she can depend on you, he/she will. That's a real feather in your cap.

Be enthusiastic about your work. One of the most difficult problems bosses face is motivating a worker who sees his/her job as little more than a necessary evil in the pursuit of a paycheck. Managers know they can't buy it no matter how high the wages, but they place much value on it.

If your enthusiasm is genuine, it will show. Do you take pride in your work? Are you willing to come early and stay late when necessary? Are you optimistic about the future of the business or industry you work for? Do you tackle assignments cheerfully, without trying to think up reasons why they just can't be done? If your answers to these questions are completely negative, maybe you're in the wrong job.

Learn to take criticism. The inability to accept constructive criticism and advice--from supervisors and co-workers alike--is a serious handicap. If you do a slow burn every time the boss points out your mistakes, he/she is bound to feel uncomfortable about it and is likely to resent your attitude. After all, guiding and correcting your work is part of his/her job. Listen to what he/she tells you and apply his/her suggestions to what you're doing. Temperamental workers, no matter how brilliant, are something most bosses would rather do without.

Don't play office politics. Few things can destroy office moral faster than presence of gossipers and other thoughtless workers who start or pass along uncomplimentary and embarrassing stories about fellow workers. Ignore office rumors and tend to your business. Don't take sides in disputes between other workers or you may end up a part of the gossip yourself. Resist the temptation to grumble about minor inconveniences caused by management decisions; if you have a legitimate complaint,

take it to your boss privately. He/she will appreciate hearing it from you before he/she hears it via the grapevine.

Don't compete with the boss. Everybody wants to get ahead on the job, of course. But if you aim to do it by demonstrating to everybody else that you know more about the business than your boss does, watch out. In the first place, you probably don't. And in the second place, you'll find that no one--including your boss's boss--appreciates a worker who constantly goes over his/her supervisor's head or tries to show him/her up. If you buck your boss at every turn, downgrade his/her competence and generally make his/her life miserable, be prepared to lose when the showdown comes.

Remember, bosses are human too. Chances are your boss isn't the world's foremost authority in his/her field, so don't expect him/her to be. He/she will make mistakes occasionally. He/she may be abrupt or grouchy from time to time, as we all are. And when he/she really applies the heat, it's often because his/her boss is putting the heat on him/her.

You'll probably never find the *perfect boss*, just as you'll never be the *perfect employee*. But in general, your ability to get along with the person you report to can enhance your prospects at every step on the job ladder.

Author Unknown

SYLLABUS FOR
PERSONAL DEVELOPMENT
PSY 231

This syllabus was developed by Carol Cartner and Bobbie Brown, Business Instructors at Catawba Valley Technical Institute. The syllabus was reviewed by the Secretarial Science Curriculum Advisory Committee.

Appreciation is expressed to Ms. Cartner and Ms. Brown and to Catawba and to the Advisory Committee for their assistance and contributions.

I. DESCRIPTION OF COURSE:

This course is designed to help the student look and feel more attractive and to complement development in other meaningful areas. Areas of study include physical control and visual poise; personal grooming and makeup application (women only); wardrobe selection; communication skills; social and business etiquette; techniques for getting a job, handling a job efficiently and relating to employers and co-workers.

II. COURSE OBJECTIVES:

Given the materials as presented in this course, the student will be able to:

1. Understand the importance of (a) nutritious diet for good health and figure control, (b) appropriate exercise and recreation, (c) adequate rest and (d) developing visual poise.
2. Understand the importance of personal hygiene.
3. Appropriately care for skin, apply makeup and correctly use manicuring techniques.
4. Appropriately care for hair and select the best style.
5. Select a basic wardrobe based upon life style, line and color.
6. Coordinate and complement a basic wardrobe with nonbasic items and accessories.
7. Speak effectively, make introductions properly and demonstrate appropriate conversational techniques.
8. Demonstrate effective telephone techniques.
9. Demonstrate acceptable table manners and restaurant etiquette.
10. Understand acceptable social and business etiquette.
11. Understand ways to find available jobs and demonstrate the techniques in applying for a job.
12. Understand the techniques for job success.

III. COURSE OVERVIEW:

- A. Body perfection
- B. Personal grooming
- C. Wardrobe
- D. Communication
- E. Social and business etiquette
- F. Applying for a job
- G. Job success

IV. CREDITS, HOURS, PREREQUISITES:

- A. Three-five (3-5) quarter hours credit
- B. Three-five (3-5) class hours per week; zero-four (0-4) laboratory hours per week
- C. Prerequisite: None

V. EVALUATION:

Evaluation is based on the completion of stated objectives and should include one or more of the following:

- A. Objective-type tests
- B. Discussion-type tests
- C. Combination of A and B
- D. Demonstrations
- E. Class projects
- F. Problem-solving activities (oral and written)

PERSONAL DEVELOPMENT

BASIC OUTLINE

Unit I. Body Perfection

- A. Nutrition
- B. Balance
- C. Posture

Unit II. Personal Grooming

- A. Grooming
- B. Skin care and makeup application (for women only)
- C. Basic hair care and styling
- D. Fingernail grooming

Unit III. Wardrobe

- A. Line selection
- B. Color selection
- C. Basic wardrobe
- D. Accessories

Unit IV. Communications

- A. Speaking voice
- B. Communication techniques
- C. Introductions
- D. Telephone techniques

Unit V. Social and Business Etiquette

- A. Table manners
- B. Restaurant etiquette
- C. Offensive behavior

Unit VI. Applying for a Job

- A. Job selection
- B. Application items

Unit VII. Job Success

- A. Successful techniques
- B. Pleasing the boss
- C. Job termination

Competency

Content Outline

Activity Experience

Evaluation

I. Body Perfection

To have a knowledge of good nutrition principles.

A. Nutrition

1. Analyzing nutrition
2. Good habits
3. Identification of ideal weights

Lecture/discussion

Record all foods and beverages consumed in two days. Calculate calories and nutritive value.

Prepare a menu for two days with the proper nutritive values.

Determine dietary needs by weighing and consulting an ideal weight chart. Encourage students to take appropriate action.

Given an objective- or discussion-type test, the student will be able to demonstrate with 70% accuracy a knowledge of good nutritional habits.

To be able to develop an exercise program and a nutrition plan for figure control and good health.

B. Balance

1. Exercise benefits
2. Exercise for problem areas

Lecture/discussion

Measure wrist and determine bone structure.

Invite guest speaker to demonstrate exercises for problem areas for figure control.

Encourage students to develop an exercise program and keep an individual progress record.

Given an objective- or discussion-type test, the student will be able to demonstrate with 70% accuracy a knowledge of proper balance.

The student will be able to demonstrate graceful presentation of form in the following areas of visual poise: good posture, the walk, basic stances, pivots, ascend and descend stairs, get into and out of cars, pick up objects off floor, enter and exit room, put on and remove coat and gloves and sit.

C. Posture

1. Standing
2. Sitting
3. Walking
4. Sleeping
5. Bending and lifting
6. Carrying objects
7. Pushing and pulling
8. Ascending and descending stairs
9. Entering and exiting
10. Putting on and taking off coat and gloves
11. Carrying hand articles

Lecture/discussion

Video tape class individually in the areas of visual poise in which instruction is to be given.

Present audiovisuals of correct techniques of visual poise (Milady Pub. Co.)

Students practice correct techniques in class.

Video tape class individually in the areas of visual poise in which instruction was given.

Given an objective- or discussion-type test, the student will be able to demonstrate with 70% accuracy a knowledge of proper posture.

Competency	Content Outline	Activity Experience	Evaluation
	II. Personal Grooming		
The student will demonstrate a knowledge of personal hygiene of body, breath and clothing.	A. Grooming 1. Hygiene of body 2. Oral hygiene 3. Clothing care	Lecture/discussion Distribute check sheet on clothing care and discuss in class. (Appendix) Have students prepare a list of their daily plan for personal hygiene. Discuss an ideal daily plan for personal hygiene and have students compare with their own plan. Have students inspect their own wardrobe, checking carefully for any spots, loose or damaged buttons, weak straps, frayed edges, loose hems, soiled belts, dirty collars or trimmings, wrinkles, lint, etc. Make a determined effort to fix anything in need of repair as soon as possible. Have students take stock of personal hygiene articles to see if any additional items need to be included.	Given an objective- or discussion-type test, the student will be able to demonstrate with 70% accuracy a knowledge of personal hygiene of body, breath and clothing.
The student will be able to demonstrate a knowledge of proper skin care and makeup application.	B. Skin care and makeup application 1. Basic skin care a. Skin and nutrition b. Skin and relaxation c. Skin cleansing d. Skin moisturizers e. Skin damage 2. Makeup application a. Cleansing b. Balance of oil and moisture c. Foundation d. Powder e. Cheek color f. Eye makeup g. Eyebrows h. Lip care i. Contouring j. Special problems	Lecture/discussion Have students examine face to determine skin type. Give students copy of printed sheet on facial shapes. (Appendix) Have students determine their facial shapes. Makeup demonstration by instructor, invited guest or field trip. Encourage students to have a personal makeup analysis by a knowledgeable person in one of the lines of cosmetics.	

Competency

Content Outline

Activity Experience

Evaluation

The student will be able to demonstrate knowledge of hair care and style selection.

C. Basic hair care and styling

1. Shampooing
2. Hair problems and corrective procedures
3. Color
4. Style selection
5. Styling aids
6. Hair pieces and wigs

Have students check their eyebrow shape to see if they balance their facial features. Encourage students to shape their eyebrows if necessary.

Encourage students to analyze their own facial shape and other physical features affected by hair style.

Encourage students to experiment with many hair styles, studying the face and profile, to see which styles are most flattering.

Have students write a brief description of the general type of hair style that would be best for them for office wear. Indicate such information as length, forehead treatment, styling of crown, sides and back hair. Indicate also, where there will be any fullness or height.

Use cutouts of facial shapes and wigs to illustrate flattering hairdo.

Invite a hair stylist to visit the class. If possible, he/she should evaluate each student's hair style selection.

Lecture/discussion

Encourage students to give themselves a complete manicure following all the steps a professional manicurist would take.

Encourage students to develop habits which will improve nail care.

The student will demonstrate a knowledge of manicuring techniques for preventive care as well as good grooming.

D. Fingernail grooming

1. Manicuring techniques
2. Nail problems
3. Preventive care
4. Camouflage

Competency	Content Outline	Activity Experience	Evaluation
	III. Wardrobe		
The student will be able to demonstrate the effect of line in wardrobe selection.	A. Line selection 1. Internal a. Vertical b. Horizontal c. Diagonal d. Asymmetrical e. Curved f. Inverted V g. The V h. Interrupted i. Dress shapes 2. Dress shapes a. Sheath b. Gentle flare (A-line) c. Full flare 3. Figure types a. Tall b. Thin c. Full figured d. Short e. Combinations 4. Problem areas	Lecture/discussion Have student determine through self analysis figure type and problem areas. Provide visual aids to illustrate camouflage facts for optical illusion using different lines. Show examples of clothing to compliment figure types (tall, short, thin, full and combinations). Show examples of camouflaging specific figure flaws (necklines, shoulders, bust, stomach, hips, legs and feet). Assign students to prepare a booklet containing pictures of clothes appropriate for their individual figure taking into consideration what they have learned about line. (Booklet should be retained for future activities.)	Given an objective- or discussion-type test, the student will be able to demonstrate with 70% accuracy a knowledge of the use of line in wardrobe selection.
The student will be able to demonstrate the effect of color in wardrobe selection.	B. Color selection 1. Personality 2. Complimentary colors a. Skin b. Hair c. Eyes 3. Camouflage 4. Combining colors a. Dark colors with light or bright colors b. Light colors with dark colors c. Bright colors with neutral or dark colors d. How much and how many	Lecture/discussion Show sample colors and ask for student reaction demonstrating effect of color on the personality. Have students make a personal evaluation of complimentary colors, and bring examples to class. Class analyze each student to determine most complimentary colors using color samples. Have students bring to class an item of clothing and show why it is uncomplimentary to them. Show what changes should be made (line, color, accessories).	Given an objective- or discussion-type test, the student will be able to demonstrate with 70% accuracy a knowledge of color in wardrobe selection.

Competency

Content Outline

Activity Experience

Evaluation

The student will be able to select a basic wardrobe based on particular life styles.

C. Basic wardrobe

1. Basic items
 - a. Dresses
 - b. Suit (skirts/pants)
 - c. Coat
2. Basic color
3. Life style

The student will demonstrate the knowledge of coordination by adding nonbasic items and accessories to the basic wardrobe.

D. Nonbasics and accessories

Show examples of combinations of color.

Have students plan two color-coordinated costumes using colors that are most becoming.

Give students a list of items of basic dress and its color, and have them select an accent color for each.

Give students a list of outfits and have them create better color coordinations.

Bring to class "separates" (skirts, coats, pants, blouses, dresses, scarves, shawls, sweaters) in actual clothing or cut-out pictures and have coordinate outfits.

Lecture/discussion

Show examples of basic items.

Have students list the basic items in their wardrobe according to seasons and then by colors.

Have students list basic items that should be added to their wardrobe.

Lecture/discussion

Show examples of adding non-basic items to a basic wardrobe.

Have students list nonbasic items in their wardrobe.

Have students bring to class a basic item and show many different changes with nonbasic items.

Given an objective- or discussion-type test, the student will be able to demonstrate with 70% accuracy a knowledge of the basic wardrobe selection.

Given an objective- or discussion-type test, the student will be able to demonstrate with 70% accuracy a knowledge of coordinating nonbasic items and accessories to the basic wardrobe.

Competency

Content Outline

Activity Experience

Evaluation

Have students make a list of the accessories in their wardrobe indicating those that are inappropriate in size and style.

Give students a list of examples of poor accessorizing and have them suggest better versions.

Have students find pictures or items of clothing that are basic and show how they can be accessorized.

Have students find pictures or items of clothing that are difficult to accessorize.

Competency

Content Outline

Activity Experience

Evaluation

IV. Communications

The student will demonstrate a knowledge of an effective, pleasing speaking voice.

A. Speaking voice

1. Breathing
2. Voice qualities
 - a. Pitch
 - b. Rate
 - c. Enunciation
 - d. Emphasis
 - e. Inflection
 - f. Projection
 - g. Volume

At the beginning of this unit, record each student's voice and file the recording. After several class meetings, record each student's voice again and compare with the first recording.

Have students use exercise using good diaphragmic breathing habits. (See page 201 in Today's Woman.)

Have students read aloud using best enunciation expression. Practice good breathing techniques, pronunciation and enunciation.

Have students listen to the speech of those around them and report to class their observation of flaws.

Use appropriate corrective drills (enunciation, slurring, etc.) in class to improve the speaking voice.

Given an objective- or discussion-type test, the student will be able to demonstrate with 70% accuracy a knowledge on effective and pleasing speaking voice.

The student will demonstrate a knowledge of appropriate conversational techniques.

B. Communication techniques

1. Word choice
2. Personalizing
3. Listening

Lecture/discussion

Record the voice of each student as he/she speaks extemporaneously for one minute to diagnose weaknesses in conversation, particularly in grammar and choice of words.

Have students examine their speech carefully for two or three days to see if they overwork any words or expressions. Have students select two synonyms to be used instead.

Give students a list of cliches, and have students give a less trite version of each.

Give examples of localisms and discuss how their use affects other people.

Given an objective- or discussion-type test, the student will be able to demonstrate with 70% accuracy a knowledge of appropriate conversational techniques.

Competency

Content Outline

Activity Experience

Evaluation

The student will demonstrate the ability to make proper introductions.

C. Introductions

1. Wording
 - a. Man to woman
 - b. Younger to older
 - c. Lower in rank to higher
 - d. Less distinguished to more celebrated
 - e. Layman to clergyman
2. Acknowledging
3. Shaking hands
4. Knowing when to rise

Have students choose strong words from commercials and decide how these words affected them.

Lecture/discussion

Encourage students to look for opportunities to make introductions.

Role playing - use a variety of introductions.

Given an objective- or discussion-type test, the student will be able to demonstrate with 70% accuracy a knowledge of making proper introductions.

The student will demonstrate the knowledge of effective telephone techniques.

D. Telephone techniques

(Importance of pleasing voice should be emphasized here if not covered in Unit IV, Competency A.)

1. Equipment
2. Services
3. Planning and placing
4. Answering business calls
5. Telephone message form
6. Telephone directory usage
 - a. Introductory pages
 - b. Alphabetical section
 - c. Yellow pages

Lecture/discussion

Film (Available from Southern Bell Telephone Company.) "How to Lose Your Best Customer Without Really Trying."

Slide-cassette presentation, transparencies on equipment and information on services. (Available from Milady Publishing Co., Bronx, New York.) "Telephone Techniques for the Secretary."

Teletrainer unit and role playing exercises. (Available through local telephone offices.)

Invite a local telephone representative to speak about telephone techniques.

Situations may be developed by students for role playing.

Have students observe telephone techniques and switchboard operations of the school receptionist.

Give students examples of telephone messages to be recorded completely on telephone message forms.

Given an objective- or discussion-type test, the student will be able to demonstrate with 70% accuracy a knowledge of effective telephone techniques.

Competency	Content Outline	Activity Experience	Evaluation
	V. Social and Business Etiquette		
The student will demonstrate the knowledge of acceptable table manners.	A. Table manners 1. Proper eating techniques 2. Table settings	Lecture/discussion Demonstrate correct table settings.	Given an objective- or discussion-type test, the student will be able to demonstrate with 70% accuracy a knowledge of appropriate table manners.
The student will demonstrate the knowledge of acceptable restaurant etiquette.	B. Restaurant etiquette 1. Checkroom procedure 2. Procedure with headwaiter or hostess 3. How to order 4. Menu terms 5. Tipping guide	Lecture/discussion Skits demonstrating right and wrong techniques.	Given an objective- or discussion-type test, the student will be able to demonstrate with 70% accuracy a knowledge of appropriate restaurant etiquette. Students will have a meal as a group in a local restaurant where they have an opportunity to demonstrate skills and knowledge learned.
15 The student will become aware of offensive social and business behavior.	C. Offensive behavior 1. Smoking 2. Chewing gum 3. Alcoholic beverages	Lecture/discussion *Slide-cassette presentation, "How Not to Offend Others When Smoking or Chewing Gum." Have students relate incidents when social behavior was unacceptable. Skits demonstrating right and wrong techniques.	Given an objective- or discussion-type test, the student will be able to demonstrate with 70% accuracy a knowledge of offensive behavior.

*Available from MCP Educational Publishers, Division of Milady Publishing Corp.

Competency	Content Outline	Activity Experience	Evaluation
	VI. Applying for a Job		
The student will become aware of job opportunities available.	A. Job Selection 1. Sources of job supply 2. Consideration a. Size of company b. Salary c. Advancements	Lecture/discussion Invite speakers from industry and employment agencies to identify impressionable characteristics of job applicants. Have students investigate employment characteristics of a company and be prepared to report to the class. Have student relate why or why not he/she would look there.	
The student will become aware of proper techniques for job application.	B. Application items 1. Letter of application 2. Application form 3. Personal data sheet 4. Interviewing 5. Follow-up letter	Lecture/discussion Have students prepare a letter of application, personal data sheet, application form and follow-up letter. Conduct mock interviews in class using resource people from the school or community.	Submit to instructor folder containing usable copies of all application items.

Competency	Content Outline	Activity Experience	Evaluation
	VII. Job Success		
The student will become aware of techniques for success during the first days on a new job.	A. Successful techniques 1. Remember names 2. Take notes 3. Ask questions 4. Learn/follow office regulations 5. Show initiative 6. Appearance	Lecture/discussion Film, "What Do We Look Like to Others." (Sandler Inst. Films, Inc.) Have students identify subject that should not be discussed with office friends. Use games for name-face association. Have students debate the uses and abuses of cliques.	
The student will become aware of ways to please the boss.	B. Pleasing the boss 1. Loyalty 2. Promptness 3. Regular attendance 4. Self control 5. Respect and cooperation 6. Relating to co-workers	Lecture/discussion Have students analyze their employer listing special preferences and dislikes. (If unemployed, have them use some other person that they know well.) Suggest what they should do to avoid conflicts. Use case studies for class discussion. Have students roleplay as head of an office. List personality characteristics and work habits they would want in their employees. Skits demonstrating difficult problem office situations. Have students list five things an office associate would appreciate. Suggest awkward situations in which an employee must use tact. Have students suggest several ways to handle each situation. For example: An overworked executive wants you to help by doing extra work without asking your boss; a gossipy older employee tries to draw you out about the failings of co-workers.	

Competency	Content Outline	Activity Experience	Evaluation
The student will become aware of techniques for job termination.	C. Job termination	Have students list outside activities to help balance the strains of the working day. Use some type of self-quiz to help students measure their success potential in the office. Lecture/discussion	

BIBLIOGRAPHY

1. Books

Contemporary Programs, Inc. Women's Contemporary Image: A Personal and Professional Guide. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.

James, Barry. Call Me Mister: A Man's Guide to Business and Social Success. New York: MPC Educational Publishers, Division of Milady Publishing Corp., Current Edition.

Reynolds, Caroline. Dimensions in Personal Development. Cincinnati: South-Western Publishing Co., Current Edition.

Tolman, Ruth. Charm and Poise for Getting Ahead. New York: Milady Publishing Corp., Current Edition.

Whitcomb, Helen and Rosalind Lang. Today's Woman. New York: Gregg Division, McGraw-Hill Book Co., Current Edition.

2. Periodicals

Administrative Management

Balance Sheet

Business Education Forum

Business Education World

Journal of Business Education

New Dimensions for Teaching Personal Development

Self

Viewpoints in Business and Office Education

Working Woman

Publications from Business, Management, Office, Secretarial, Health Psychology Associations

3. Audiovisuals

The Many Faces of Beauty. Series 1-12. New York: MPC Educational Publishers, Division of Milady Publishing Corp. (Consists of almost 1,000 slides, cassette tapes, written commentary, lesson plans and instructor's guides. Sold as a set or by individual series.)

The New Faces (12 face charts). New York: MPC Educational Publishers, Division of Milady Publishing Corp., Current Edition.

Personal Hygiene for Business. New York: MPC Educational Publishers, Division of Milady Publishing Corp. (Set of 22 full-color slides, a cassette tape and an instructor's guide.)

Exercise Records: Feel Good, Look Great With Debbie Drake.
New York: EPIC Records.

Visual Poise for Business and Social Success. Series 1-14. New York:
MPC Educational Publishers, Division of Milady Publishing Corp.
(Consists of 365 35mm slides and 14 cassette tapes. Sold as a set
or by individual series.)

4. Other Sources

Carnegie, Dale. How to Win Friends and Influence People. New York:
Pocket Books, Inc., Division of Simon & Schuster, Inc., Current
Edition (paperbound).

Everhardt, R. M. and Robert Leonard. Personal Dynamics in Personality
Development. Columbus, Ohio: Ohio Distributive Education
Materials Laboratory, Ohio State University, Current Edition.

Molloy, John T. Dress for Success (Men). New York: David McKay Co.,
Inc., Current Edition (hard copy) or New York: Warner Books,
Inc., Independent News Co., Current Edition (paperbound).

Molloy, John T. The Woman's Dress for Success. New York: Warner
Books, Inc., Independent News Co., Current Edition (paperbound)
or Chicago: Follett Publishing Co., Current Edition (hard copy).

Peale, Norman Vincent. Enthusiasm Makes the Difference. Englewood
Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition (hard copy)
or New York: Fawcett Book Group, Current Edition (paperbound).

Personally Yours (Workbook for women's program). New York: MPC
Educational Publishers, Division of Milady Publishing Corp.,
Current Edition.

Portfolio of Activities for Today's Woman (Workbook). New York:
Gregg Division, McGraw-Hill Book Co., Current Edition.

Success Insurance (Grooming booklet for women's program). New York:
MPC Educational Publishers, Division of Milady Publishing Corp.,
Current Edition.

Success Insurance In A Man's World (Grooming booklet for men's program).
New York: MPC Educational Publications, Division of Milady
Publishing Corp., Current Edition.

Tolman, Ruth. Secretary's Guide to Beauty, Charm and Poise. New York:
Milady Publishing Corp., Current Edition.

Wade, Carlson. The New Enzyme-Catalyst Diet: Amazing Way to Quick,
Permanent Weight Loss. West Nyack, New York: Parker Publishing
Company, Inc., Current Edition.

APPENDIX

SHEET FOR DETERMINING FACIAL SHAPES



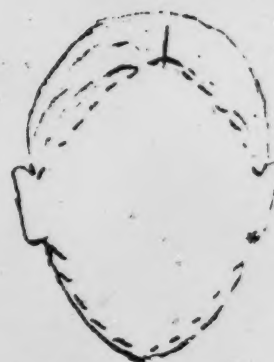
Oval



Round



square



diamond



oblong



Triangular



Heart

GOLDEN RULES FOR ALL COMPLEXIONS

1. Keep your skin clean.
2. Get sufficient rest.
3. Eat a well-balanced diet and drink a lot of water, milk, juices.
4. Give your skin a vacation from makeup whenever possible.
5. Don't squeeze blackheads or pimples
6. Choose treatment products for specific needs.
7. Look at the brighter side of life.
8. Adapt your beauty routine to the seasons.
9. Look for professional help when necessary.

Whitcomb and Lang. Today's Woman. McGraw-Hill Book Co., New York, 1976.

CLOTHES CARE TEST

Check yourself on the care you give your clothes. If you score between 165 and 220, your clothes are a personality asset. If your score is between 110 and 165, you sometimes feel it at ease in a group because of your clothing. Any score under 110 you should spend much more time on the care of your clothes.

Give yourself 5 points for excellent, 3 points for good, 1 point for fair, and 0 for poor.

COATS, SUITS AND DRESSES

SCORE

1. Do you keep your skirts on hangers adapted only for that purpose? _____
2. Do you keep seldom-used clothes in dust-proof bags? _____
3. Do you send dark-colored garments to the cleaners as often as they should be sent.....frequently? _____
4. Do you have heavily padded hangers for coats and jackets? _____
5. Do you leave enough space between each garment in the closet so that they won't get crushed? _____
6. Do you close all zippers and button when you hang a garment? _____
7. Do you open all fastenings before putting a garment on? _____
8. Do you handle all your clothes carefully and hang them as soon as you take them off? _____
9. Are you careful so as not to ruin your clothes with perspiration stains? _____
10. Do you mend and repair your garments as soon as you notice they need it? _____
11. Do you remove spots and stains as soon as they appear? _____
12. Do you avoid using your better clothes for house work and lounging? _____
13. Do you properly "moth" proof your woolen garments at the end of the season? _____
14. Do you keep a clothes brush handy and use it? _____
15. Do you use a pressing cloth? _____
16. Do you rotate the wearing of your clothes so that each has a chance to "rest" between times? _____

HATS AND GLOVES

SCORE

1. Do you keep your hats protected from dust between wearings? _____
2. Do you stuff the crowns with tissue to prevent their getting out of shape? _____
3. Do you have a special place for your gloves so that they are put away flat and in shape? _____
4. Do you wash white gloves after wearing? _____
5. Do you avoid wearing gloves that look shabby either because of too much wear or improper care? _____
6. Do you fold your gloves properly whenever you remove them? _____

SHOES AND HOSE

1. Do you keep your heels even, not run-over? _____
2. Do you replace heel caps often enough to prevent ruining the heels of your shoes? _____
3. Do you keep your shoes brushed and polished? _____
4. Do you protect your shoes from dust when not in use? _____
5. Do you avoid getting your shoes wet? _____
6. Do you help them retain their shape by using shoe trees? _____
7. Do you use a shoe horn to avoid crushing the heel contour? _____
8. Do you wash your hose after each wearing? _____
9. Do you roll your stocking to the foot when putting it on? _____
10. Do you wear gloves when handling your hose to prevent snagging your hose? _____
11. Do you rub your feet with cream to prevent roughness and runs in hose? _____

OTHER ITEMS

1. Do you empty your handbag once a week so as to brush and clean the lining? _____
2. Do you wash your girdle often enough to keep it fresh? _____
3. Do you fold sweaters and put them in a drawer rather than hang them on hangers? _____
4. Do you follow the fabric care directions given with your clothing purchases? _____
5. Do you give your jewelry an ammonia beauty bath? _____
6. Do you allow your night clothes to air? _____

THE RIGHT WAY TO QUIT

You have made the decision. You are going to quit your job. Maybe wedding bells are in your future, or you are moving to another city. Perhaps a better job offer came your way. Perhaps you are just plain unhappy with your work. Whatever the reason, there is a right way to quit your job.

1. Tell your boss first. The average job stay for girls is less than three years, so he is probably familiar with farewell speeches.

Jane S. dreaded telling her boss she wanted to quit. Finally, she got up enough courage to say he didn't like commuting and was looking for a job in her suburb.

This was far from the truth. Actually, she liked the company and had made many new friends, but she found the work in the accounting department difficult and uninteresting. Fortunately, the personnel manager discovered the real reason for dissatisfaction and promptly transferred her. "It was a case of poor job placement on our part," he said.

"Be honest with your boss," urges Joseph Fleming, employment representative at United Air Lines. "It is important for the employee to give the real reason for leaving her job. Perhaps conditions may be changed, if not for that person, at least for her successor."

If you wish to leave to earn more money, by all means mention it. You might get a raise. If you feel you are in a "blind alley" job, be frank about it. Many positions don't lead anywhere, and the employer knows it. Every boss feels a little sad at the sight of a sparkling new diamond ring on his favorite secretary's finger, but all are quick to offer sincere best wishes. (Marriage and motherhood are among the most usual reasons why women leave.)

2. Give at least two weeks notice. A personnel manager was interviewing a young woman for a secretarial position. "How soon can you come to work for us?" he asked. "Oh, as soon as possible," she replied. "I can't stand my job."

"I would never hire her," he confided. "She might decide to leave us without notice!"

Two weeks is the absolute minimum for giving notice. However, the employee also should consider the "availability of a replacement." Many companies promote from within, and it is a matter of a chain reaction when someone leaves. If this is the case, or if you hold an extremely important position, a month's notice is not too much to give--if possible.

3. Tell your co-workers. Of course, you have to tell everyone your exciting news. But resist the temptation to talk too much about your dazzling new job. Your fellow workers are, after all, still staying; so they probably think their job and the company are all right. Don't air your dissatisfactions. Maybe you have legitimate gripes, but it would be nasty to foment mass rebelliousness. I recall one office where I worked. One of the secretaries was leaving for New York. Her "rotten" job was her constant subject of conversation, and soon almost everyone was grumbling. When she finally left, office morale soared.

4. Continue to do your usual excellent jobs. Most secretaries have a feeling of responsibility and continue to do their jobs well after they have given notice. Much

depends on attitudes toward the job and the boss. Human nature plays an important role, too.

Lois W. was getting married in January and moving to her fiance's hometown. Everyone understood her excitement; but watching her dream the day away annoyed the others, who were still putting in a day's work in the steno pool. They justifiably resented having to do more work while she was inattentive.

Though your heart is set on your next endeavor, you must sincerely continue to do your very best, even when you feel left out as new projects go to someone else and others are trained to do your job. It hurts morale to discover you can be replaced!

5. Help your successor. Type a list of helpful job instructions. When Barbara M. was leaving her job to go with her soldier-husband, she devised an easy way to help her replacement. She went through her desk calendar and typed a list of things that had to be done monthly, along with any special notes she could think of.

If you work for a company that prefers to promote from within, you may be called upon to help choose your replacement (many businessmen realize their secretaries may be more aware of the personality traits and skills necessary for the job).

Theron Wright, director of Chicago's Moser Secretarial School, suggests "the girl tell her successor what particular things are important to the employer. Nothing is gained by discussing personality faults, though." For example, if Mr. B. insists on his office being dusted each day, the incoming secretary should be told to do it; whether he's fussy or has an allergy is beside the point.

You will be a happy memory to your co-workers if your work is in order when you go (or as close to that as you can manage). Orienting a new person plus having to search for important data after you've gone makes life hard. Give your boss your new phone number, just in case.

6. Should you ask for a letter of recommendation? Not as a rule. Most companies tend to disregard a letter handed to them. They prefer to check on their own. According to Mr. Fleming, "Work experience, personality on the interview, and skills are much more important than the letter of recommendation."

In some circumstances, though, it is wise to ask for a letter of recommendation. Betty G. decided to return to the business world when her youngest child started school. When she couldn't find her former employer in the telephone book, she called his colleague, only to be told he'd retired and "was out West." The moral: If you work for a one-man operation or a very small company, it is wise to ask for a letter simply as verification, in years to come, that you did work there.

7. On your last day, be a little sad. Promise to keep in touch. Stop in if you really mean it. One of the great pleasures in life is keeping friendships fresh.

Follow these seven simple suggestions and you will be certain of an excellent reputation and recommendation.

SYLLABUS FOR
PRINCIPLES OF SUPERVISION
BUS 272

This syllabus was developed by Joan Citty, Business Department Chairperson, Rockingham Community College and Benjamin J. Leith, Business Department Chairperson, Craven Community College. The syllabus was reviewed by the Marketing and Retailing Curriculum Advisory Committee and the Business Programs Curriculum Advisory Committee. Appreciation is expressed to Mrs. Citty and Rockingham Community College, Mr. Leith and Craven Community College and to the Curriculum Advisory Committees for their assistance.

I. DESCRIPTION OF COURSE:

This course is designed for present and prospective supervisors, who have the need and desire to participate in learning activities that will assist the participants in becoming more effective supervisors.

The student will study organizational goals and objectives, training and instructional techniques, evaluation and counseling, delegation, planning and organizing and problem solving.

Successful completion of this course should provide the student with a better understanding of various techniques which can be used to improve effectiveness as a supervisor.

II. COURSE OBJECTIVES:

Given the material as presented in this course, the student will be able to:

1. write a definition of the supervisor's role.
2. discuss the varied aspects of the supervisor's role.
3. differentiate and discuss the styles of leadership.
4. discuss and demonstrate means for improving communications.
5. identify and discuss organizational goals and objectives.
6. identify procedures and methods and their relationship to the planning and organizing function.
7. discuss and apply training and instructional techniques.
8. select and evaluate effective evaluation and counseling guidelines.
9. discuss criteria that can be utilized in defining ways to delegate authority.
10. discuss and utilize decision-making criteria in problem identification and solution.

III. COURSE OVERVIEW:

- A. Role and definition of supervision
- B. Leadership
- C. Motivation
- D. Communication
- E. Goals and objectives
- F. Planning and organizing
- G. Training and instruction
- H. Evaluation and counseling
- I. Delegation
- J. Problem solving

IV. CREDITS, HOURS, PREREQUISITES:

- A. Three (3) quarter hours credit
- B. Three (3) quarter hours per week
- C. Prerequisite: None

V. EVALUATION:

Evaluation is based on the completion of stated objectives. Objective and subjective-type tests are suggested throughout the outline.

360

IDECC SYSTEM CODE

ADV	ADVERTISING
COM	COMMUNICATION
DIS	DISPLAY
HR	HUMAN RELATIONS
MGT	MANAGEMENT
MATH	MATHEMATICS
MDSE	MERCHANDISING
OPER	OPERATIONS
P&S	PRODUCT AND SERVICE
SELL	SELLING

COMPETENCIES FOR SUPERVISION

Based on the IDECC system, competencies identified for marketing and retailing career opportunities (Refer to Appendix G.†) and/or the post-secondary course in Supervision are listed below by competency area. These competencies may not be included in the course syllabus. Competencies were appropriate for the career opportunities identified but the LAP materials were not appropriate and/or the competency was mastered previously.

*This is found in the Marketing and Retailing curriculum guide. For additional information, write Program Development Div., Dept. of Community Colleges.

Competency Area	Knowledge	Skill	Attitude
ADVERTISING			
COMMUNICATIONS			
DISPLAY			
HUMAN RELATIONS			
MATHEMATICS			
MERCHANDISING			
PRODUCT AND SERVICE TECHNOLOGY			
OPERATIONS AND MANAGEMENT	604	690	740
	605	691	741
	606	693	742
	607	694	744
	608	695	745
	609	699	747
	610	712	748
	611	715	749
	612	716	751
	613	722	752
	617	723	758
	635	729	759
	652	734	762
	660		763
	664		766
			768

Competency Area	Knowledge	Skill	Attitude
OPERATIONS AND MANAGEMENT (Continued)			779
			782
			786
			788
			792
			795
SELLING			

INTRODUCTION

The materials in this syllabus are designed for a curriculum course(s) and for inservice education. The instructor will find that the comprehensive syllabus will not permit total coverage of all materials in a 33-hour time period.

Based on the student's previous knowledge of and/or skill in supervisory techniques, the instructor will need to decide which of the ten sections should be taught.

At the end of each section there is an Annotated Bibliography. The syllabus also contains a complete Bibliography listing textbooks, reference books, periodicals, audiovisual aids and other sources.

Competency	Content Outline	Activity Experience	IDECC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page No.	
I. Role and Definition of Supervision	I. Role and Definition of Supervision	I. Role and Definition of Supervision					I. Role and Definition of Supervision
A. To describe the historical developments of supervision.	A. Supervision through history	Lecture/discussion					A. Given a list of four historical leaders in supervision, the student will be able to identify in writing the theories of two with 90% accuracy.
	1. Pyramids						
	2. Moser	Prepare transparencies or other visual aids on pyramids.					
	3. Frederick W. Taylor - Scientific Management						
	4. Elton Mayo - Hawthorne Studies	Have students read, analyze and suggest solutions to the case problems presented at the end of Chapter I in <u>Management-Minded Supervision</u> .					
B. To identify the social and organizational sources of supervision.	B. Pressure Sources of Supervision						B. Given an essay-type test question, the student will be able to describe in writing the factors that influence the style and degree of organizing the supervisor's job.
	1. Socially	Have students describe any experience they have that qualifies them to be a supervisor. Rather than listing actual work experience, they should consider skills acquired in administration, dealing with people and managing themselves. They should jot down all their special skills and qualities that would prove useful in supervisory work. They should analyze whether they have the basic skills and abilities they would need. If they don't, can they get them? How do they measure up as a potential supervisor?					
	a. Formal organization structure						
	b. Informal organization						
	c. Competitive forces						
	d. Social customs and traditions						
	e. Personal values of the decision-maker						
	2. Organizational						
	a. Company ownership						
	b. Union						
	c. Government						
C. To identify and discuss the major functions of the supervisor.	C. Universal Supervisory Functions						C. Given a list of eight functions, six of which are accepted as standard supervisory functions, the student will be able to identify and define correctly 80% of the recognized functions.
	1. Creating						
	2. Planning						
	3. Organizing						
	4. Motivating						
	5. Communicating						
	6. Controlling						

Competency	Content Outline	Activity Experience	IDECC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page no.	
		A group discussion could be built on whether students feel it is a good thing or bad thing for supervisors to join unions. Would their interests be better served by membership in professional organizations? Have students rate themselves as potential supervisors using the skills rating chart in Supervision: <u>Principles of Professional Management.</u> Have students make a list of the skills they would like to improve, and draw up a plan for improving them. They should check themselves in a few weeks to see if they have improved in any of these areas.					

BIBLIOGRAPHY

Role and Definition of Supervision

Bittel, Lester R. What Every Supervisor Should Know. New York: McGraw-Hill Book Company, 1974.

The many roles and responsibilities of a supervisor are introduced in Chapter 1. The five directions of a supervisor's main responsibilities are illustrated graphically. Related case problems are presented.

Boyd, Bradford B. Management-Minded Supervision. New York: McGraw-Hill Book Company, 1976.

Chapter 1 discusses what today's supervisor needs to perform well, the supervisor as part of management and the management responsibilities of today's supervisor. Related case problems are presented.

Chapman, Elwood N. Supervisor's Survival Kit. Chicago: Science Research Associates, 1970.

Chapter 1 contains a checklist for prospective supervisors identifying the role of a supervisor. Chapter 2 contains ten tips to guide a new supervisor during the first few weeks in a new position.

Fulmer, Robert M. Supervision: Principles of Professional Management. Beverly Hills: Glencoe Press, 1976.

Chapter 1 presents a very good overview of supervisory functions. The chapter discusses the many roles of a supervisor, the need for supervisors and the varied job possibilities of a supervisor.

Chapter 2 contains a skills rating chart to be used in rating one's supervisory skills. Maslow's ladder of needs is presented in the discussion of understanding human needs.

Hannaford, Earle S. Supervisor's Guide to Human Relations. Chicago: National Safety Council, 1967.

Responsibilities of the supervisor are discussed in Chapter 1 in terms of responsibility and authority and managerial, instructional, supervisory responsibilities of the supervisor.

Hicks, Herbert G. The Management of Organizations: A Systems and Human Resources Approach. 2nd ed. New York: McGraw-Hill Book Company, 1972.

Chapter 12 presents an overview of the job or functions of managers including creating, planning, organizing, motivating, communicating and controlling to accomplish organizational objectives.

Sartain, Aaron Quinn and Alton Wesley Baker. The Supervisor and His Job. New York: McGraw-Hill Book Company, 1965.

A detailed definition of supervision is presented in Chapter 1. Three major factors affecting the supervisor's job are discussed.

Competency	Content Outline	Activity Experience	INTEC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page No.	
II. Leadership	II. Leadership	II. Leadership	MGT	1	509	18	II. Leadership
A. To define the functions of a leader.	A. Functions of the leader	Have students interview a friend about his work and determine the degree to which his supervisor uses autocratic participative and free-run styles.		18	792	595	A. Given a completion-type test, the student will be able to define the various functions of leadership with 80% accuracy.
B. To identify the responsibilities of the leadership role.	B. Leadership responsibilities	Have student analyze and suggest solutions to the mini-cases provided in Chapter 6 of <u>First-Line Management</u> .					B. Given the statement "Why is a leader's approach 'let's go' whereas the old-time boss says 'Go'?", the student will be able to identify at least five (5) leadership responsibilities with 100% accuracy that support the statement.
	1. Determines realistic performance objectives	Have students read and discuss the relevant case problems presented in Chapter 9 of <u>Managing People at Work</u> .					
	2. Provides workers with the necessary resources to perform their tasks	Have students discuss the statement, "Managers should change the shape of the hole rather than try to change the shape of the peg." From the standpoint of leadership theory, what are some of the implications of this statement?					
	3. Communicates to workers what is specifically expected of them	Have students perform the experiment presented at the end of Chapter 14 in <u>Supervision: Principles of Professional Management</u> . The experiment is designed to see what characteristics other people consider most important for leadership.					
	4. Provides an adequate reward structure to encourage performance						
	5. Delegates authority where needed and invites participation when possible						
	6. Removes barriers and stumbling blocks to effective performance						
	7. Appraises performance and communicates the results of evaluations						
	8. Shows personal consideration for the employee						

Competency	Content Outline	Activity Experience	IDECC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page No.	
C. To describe the concepts related to the authority of leadership.	C. The authority of leadership	Lecture/discussion					C. Given the three concepts of authority of leadership, the student will be able to compare and contrast the three with 70% accuracy.
	1. The top-down authority concept a. Traditional positions b. Role given to selected individuals (1) Must be willing (2) Must be capable c. Source of authority rests at top of organization d. Strict adherence to chain of command 2. The bottom-up authority concept a. Behavioral management philosophy b. Leaders are selected by followers c. Authority granted by respect or admiration 3. Top-down and bottom-up need not conflict a. Top-down necessary for (1) Proper level of coordination (2) Proper level of control b. Bottom-up necessary for (1) Acceptance and support (2) Cooperation (3) Superior-subordinate relations						
D. To describe the qualifications of a leader in modern business.	D. Leadership qualities						D. Given a list of leadership qualities and a simulated business situation, the student will be able to apply the qualities to the solution of the business situation.
	1. Willingness to assume responsibility 2. The ability to be perceptive 3. The ability to be objective 4. The ability to establish proper priorities 5. The ability to communicate						

Competency	Content Outline	Activity Experience	IDEC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page No.	
E. To discuss leadership behavior and describe leadership styles.	E. A study of leadership styles 1. Typical styles of leadership behavior a. Telling b. Persuading c. Consulting d. Joining e. Delegating 2. Leadership styles a. The autocratic leader (1) Assumes all responsibility for initiating, directing and controlling (2) Expects obedience and adherence b. The participate leader (1) Uses consultation (2) Seeks opinions (3) Reserves "veto power" c. The free-reign leader (1) Expects subordinates to assume responsibilities (2) Limited amount of contact and support						E. Given a list of primary leadership styles, the student will be able to state in writing the accepted elements of the basic idea or concept pertaining to each style with 80% accuracy.

15

RHS 272

BIBLIOGRAPHY

Leadership

Davis, Keith. Human Relations at Work. New York: McGraw-Hill Book Company, 1967.

Chapter 6 provides a good discussion of the nature of leadership, personal traits that are evidence of leadership ability and the managerial styles of leadership. A managerial grid showing the two dimensions of supervisory style is illustrated.

Fulmer, Robert M. Supervision: Principles of Professional Management. Beverly Hills: Glencoe Press, 1976.

Chapter 14 is designed to help the reader identify the leadership demands of supervisory work, list various approaches to studying leadership, learn how external factors determine effective leadership styles and learn how to apply leadership concepts and skills on the job.

Harris, Jr., O. Jeff. Managing People at Work. Santa Barbara, California: John Wiley and Sons, Inc., 1976.

Chapter 9 is an excellent source of information about the responsibilities of the leader-supervisor, the authority for leadership, leadership qualities and leadership styles. There are several cases related to the chapter.

Koontz, Harold and Cyril O'Donnell. Essentials of Management. New York: McGraw-Hill Book Company, 1974.

Chapter 14 aptly defines leadership. The chapter is mostly devoted to discussing the cultivated attitudes of leaders.

Sartain, Aaron Quinn and Alton Wesley Baker. The Supervisor and His Job. New York: McGraw-Hill Book Company, 1965.

Styles of leadership, social distance and successful leadership and initiating structure and consideration of leadership is discussed in Chapter 8.

Schmidt, Warren H. "Styles of Leadership", Looking Into Leadership: Executive Library. Washington, D.C.: Leadership Resources, Inc., 1972.

This article presents a practical view of leadership giving some useful guidelines for the effective leader, five typical styles of leadership behavior and three kinds of forces that influence the leader.

Steinmetz, Lawrence L. and H. Ralph Todd, Jr. First-Line Management. Dallas, Texas: Business Publications, 1975.

The newer approaches to leadership of the 1950's and 1960's, what makes effective leadership, various leadership styles and contingency theories of leadership are topics discussed in Chapter 6. The chapter contains relevant case problems.

Trewatha, Robert L. and M. Gene Newport. Management: Functions and Behavior. Dallas, Texas: Business Publications, Inc., 1976.

A good discussion of the historical approaches to studying leadership and models of leadership is presented in Chapter 19. The various models of leadership styles are also compared.

376

Competency	Content Outline	Activity Experience	IDECC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page No.	
III. Motivation	III. Motivation	III. Motivation	MGT	15	604	518	III. Motivation
A. To identify two motivational theories and discuss and compare the research of Maslow, Herzberg, McClelland, Vroom and Adams.	A. Motivation theories and research	Lecture/discussion		15	605	533	A. Given an essay-type test, the student will be able to describe content and process theories of motivation and the importance of each theory to the supervisor with 75% accuracy.
	1. Content theories	Have students read, analyze and discuss the cases presented in Chapter 6 of <u>Organizations: Behavior, Structure, Processes.</u>		14	740	507	
	a. Maslow - Need hierarchy	Have students list Maslow's hierarchy of needs and Herzberg's motivators and hygiene factors beside them. Compare the two listings noting all similarities and differences.		14	742	475	
	(1) Physiological			14	744	464	
	(2) Safety and security			14	786	490	
	(3) Social						
	(4) Esteem						
	(5) Self-actualization						
	b. Herzberg - Two-factor theory	Have students read and respond to the problems dealing with motivation at the end of Chapter 17 and 18 of <u>Management: Functions and Behavior.</u>					
	(1) Dissatisfiers - hygiene factors	Have students read and suggest solutions to the case problems presented in Chapters 18, 19 and 20 of <u>The Management of Organizations: A Systems and Human Resources Approach.</u>					
	(a) Salary						
	(b) Job security						
	(c) Status						
	(2) Satisfiers - Motivation factors	Have students do the exercise and answer the questions dealing with motivation at work in Chapter 17 of <u>Supervision: Principles of Professional Management.</u>					
	(a) Achievement						
	(b) Recognition						
	(c) Responsibility						
	c. McClelland - Learned needs theory						
	(1) The need for achievement						
	(2) The need for affiliation						
	(3) The need for power						
	2. Process theories						
	a. Vroom - Expectancy theory						
	(1) Expectancy - a given level of effort will result in a given outcome						
	(2) Valence - the value of some desired results						
	(3) Instrumentation - will the given outcome lead to desired results						

Competency	Content Outline	Activity Experience	IDEC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page No.	
20 BUS 272	B. To apply motivational theories and research to the practice of supervision in simulated situations. B. Supervisor's approach to motivation 1. Eliminate unhealthy supervisory practices a. Discrimination b. Inability or unwillingness to communicate c. Lack of managerial knowledge and skill d. Lack of: Page 415, Management Functions & Behavior 2. Support positive management practices a. Promote sense of accountability b. Promote system of employee/ employer evaluation 3. Job enlargement a. Expand or combine the number of tasks to be performed b. Rotate jobs 4. Job enrichment a. Remove some controls while retaining employee accountability b. Increase individual accountability for work performed c. Create a natural unit of work for each employee d. Provide greater job freedom e. Make reports available to employees f. Introduce new and more difficult tasks g. Allow employees to become experts						R. Given the topic "Job Enlargement and Enrichment", the student will be able to define in writing the approach to supervision and evaluate the degree of difficulty a supervisor might have in implementing the approaches in at least one given situation.

BIBLIOGRAPHY

Motivation

Davis, Keith. Human Relations at Work. New York: McGraw-Hill Book Company, 1967.

The psychological and sociological foundations in the study of motivation are discussed in Chapter 2 in terms of human needs, wants and motivation.

Fulmer, Robert M. Supervision: Principles of Professional Management. Beverly Hills: Glencoe Press, 1976.

Chapter 17 studies the problems and possibilities of motivation presented in every day life and on the job, the relationship of personality, behavior and motivation and the different approaches to motivation. The potentials and limitations of various motivators are contrasted.

Gibson, James L. and others. Organizations: Behavior, Structure, Processes. Dallas, Texas: Business Publications, Inc., 1976.

Content theories (Maslow's Need Hierarchy, Herzberg's Two-Factor Theory, McClelland's Learned Needs Theory) and the process theories (expectancy theory, equity theory) are very well presented in Chapter 6.

Haimann, Theo and Raymond L. Hilgert. Supervision: Concepts and Practices of Management. Cincinnati: South-Western Publishing Co., 1972.

Chapter 3 presents a general overview of understanding human needs, understanding human personality, the controversy of authority vs. human relations and presents approaches to supervision relative to modern theories of motivation.

Harris, Jr., O. Jeff. Managing People at Work. Santa Barbara, California: John Wiley and Sons, Inc., 1976.

In Chapter 7 a list of human needs has been selected for discussion that represents factors often exhibited by individuals at work.

Hicks, Herbert G. The Management of Organizations: A Systems and Human Resources Approach. New York: McGraw-Hill Book Company, 1972.

Chapters 18, 19 and 20 examine motivation in terms of motivation and the need hierarchy, managerial assumptions and their effects and managerial applications of motivation. Maslow's theory of human motivation, theory X and theory Y are thoroughly examined.

Trewatha, Robert L. and M. Gene Newport. Management: Functions and Behavior. Dallas, Texas: Business Publications, Inc., 1976.

Chapter 17 presents various behavioral theories as they relate to an identification and satisfaction of individual needs. Various theories are assessed in terms of their applicability to current managerial practice.

Job enlargement, job enrichment and the elimination of unhealthy management practices are discussed in Chapter 18.

Competency	Content Outline	Activity Experience	DECC SYSTEM				Evaluation
			Comp. Area	Lap. No.	Comp. No.	Page No.	
IV. Communication	IV. Communication	IV. Communication	MGT	16	652	542	IV. Communication
A. To analyze and specify downward, upward and written communication systems, both formal and informal, internally and externally.	A. Communication systems	Lecture/discussion		3	741	84	A. Given a case problem, the student will be able to specify the system of communication which will properly be employed to assure the desired result with 90% accuracy.
	1. The formal communication system	Have students read and suggest solutions to the mini-cases presented in Chapter 11 of <u>First-Line Management</u> .		1	759	2	
	a. Downward communication	Have the students consider that they and one hundred other people are being held prisoners by an insurgent group that has just taken over the organization in which they are employed. All formal communications have been destroyed and communication by word of mouth is prohibited. Have students discuss if it is still possible to communicate. Why or why not?					
	b. Upward communication						
	c. Written communication						
	2. The work-relationship communication system						
	a. Established in the day-by-day job						
	b. May be up, down, horizontal, diagonal or peripheral						
	3. The informal communication system						
	a. Membership based on						
	(1) Friendship						
	(2) Carpool						
	(3) Outside activities						
	(4) Coffee break						
	b. May not be reliable						
	4. The external communication system	Have students discuss what accounts for the communication gap that seems to exist between management groups and labor unions in business organizations. What can be done to overcome this problem?					
	a. Basis for feedback						
	b. May be faster than the formal system						
B. To recognize communication patterns.	B. Basic network patterns of communication	Have students provide solutions to problems 2, 4, 5, 6 and 7 in Chapter 20 of <u>Management: Functions and Behavior</u> . These problems are related to communication and information systems.					B. Given a series of diagrammatic communication patterns, the student will identify in writing the network involved with 95% accuracy.
	1. Circle of peers						
	2. Chain of peers						
	3. The Y-chain with an outside member						
	4. Wheel - Has a centralized leader						

Competency	Content Outline	Activity Experience	IOPCC SYSTEM				Evaluation
			Comp. Area	Lap. No.	Comp. No.	Page No.	
C. To identify the psychological, sociological and sensory barriers to communication.	C. Barriers to effective communication 1. Psychological barriers a. Failure to understand personal motives b. Tendency to prejudice c. "It's impossible" attitude d. Not appearing serious e. Assuming an air of incredulity f. Refusal to listen g. Feelings of self-righteousness h. Rejection of a source as being valid i. The "know it all" syndrome j. The "I'm no good" syndrome 2. Sociological barriers a. The generation gap b. False role expectations c. Protection of one's prestige d. Two minds - two interpretations 3. Physical barriers a. Sensory inadequacies (noise) b. Lack of time and distance	Have students think of a classroom situation in terms of the basic elements of communication, communicator, encoding, message, medium, decoding, receiver and feedback. They should identify each element and discuss the activities involved. For example, who is the communicator, what is the message, who is the receiver, etc. Is effective communication occurring? Why? Identify where, if at all, breakdowns are occurring and why. Have students think of a situation from their own life in which communication between themselves and another individual or group was not possible. The student should identify the barriers. What might he have done to overcome these barriers? Have students think of a situation in which they have been the receiver in a one-way communication process. They should describe it. Can they think of some reasons why certain individuals might not like it? What are some reasons why some people might prefer it?					C. Given a simulated situation within a department of a firm, the student will be able to identify five barriers to communication and formulate solutions to at least four barriers.
D. To designate effective measures to counter communication barriers.	D. Bridges to good communication 1. The need for empathy 2. Have genuine concern for the problems and difficulties faced by others 3. Avoidance of defensiveness 4. Be knowledgeable 5. Avoidance of bias and prejudice 6. Practice listening 7. Be particular about the location used when communicating						D. Given a matching-type test, the student will be able to choose the best measure to offset ten communication barriers within 90% accuracy.

Competency	Content Outline	Activity Experience	INDEX SYSTEM				Evaluation
			Comp. Area	Lap. No.	Comp. No.	Page No.	
E. To determine the effectiveness of the communication.	C. How to verify your communication's effectiveness 1. Follow-up 2. Utilize feedback 3. Have messages repeated 4. Observe others 5. Use memos	Have students perform the exercises given in Chapter 3 of Supervision: Principles of Professional Management. These are practical applications of the principles of communication discussed in the chapter.					E. Given an essay-type test, the student will be able to identify at least four out of five methods of communication effectiveness.
F. To recognize the importance of listening skills.	F. Develop listening skills 1. Be interested in the subject 2. Overlook any distracting things about the way the message is being delivered 3. Stay relaxed 4. Get the message as well as the facts 5. Try to understand the system used to communicate the message 6. Be careful to avoid unnecessary distractions 7. Attempt to clarify in your own mind what is being told to you 8. Overcome slurs 9. Use thought power						F. Given an audiovisual presentation (Available from RMA Communications, Inc.) and a list of true-false statements about the presentation, the student will be able to respond to the statements within 80% accuracy.

BIBLIOGRAPHY

Communication

Fulmer, Robert M. Supervision: Principles of Professional Management. Beverly Hills: Glencoe Press, 1976.

Chapter 3 presents a very good discussion on communication. It examines why good communication skills are the key to successful supervision and explains the process of communication as an "idea transplant" with numerous possibilities for misunderstanding at every stage. The chapter also suggests various methods by which people communicate, explains how to apply the basic styles of communication to the supervisor's task and contrasts effective communication techniques with poor ones.

Gibson, James L. and others. Organizations: Behavior, Structure, Processes. Dallas, Texas: Business Publications, Inc., 1976.

The general process of communication is graphically presented in Chapter 13. Barriers to effective organizational communication and improving communication in organizations are also examined.

Haimann, Theo and Raymond L. Hilgert. Supervision: Concepts and Practices of Management. Cincinnati: South-Western Publishing Co., 1972.

The subject of communication is presented in Chapter 5 in a simple and easy to understand manner. Topics discussed are channels and directions of communications, using channels of communication, barriers to communication and means for overcoming barriers to communication.

Sartain, Aaron Quinn and Alton Wesley Baker. The Supervisor and His Job. New York: McGraw-Hill Book Company, 1965.

Chapter 18 presents a general overview of communication with discussion concentrating mainly on the topics of: some common beliefs about communication, forces making communication difficult and the supervisor and communication.

Steinmetz, Lawrence L. and H. Ralph Todd, Jr. First-Line Management. Dallas, Texas: Business Publications, Inc., 1975.

Chapter 11 aptly discusses the topics of barriers to effective communications, bridges to good communication and how to verify your communications' effectiveness.

Trewatha, Robert L. and M. Gene Newport. Management: Functions and Behavior. Dallas, Texas: Business Publications, Inc., 1976.

Chapter 20 examines the meaning and importance of communication as it relates to the entire management system. The general nature of communication is discussed and the flow of information through formal and informal organizations is presented. Barriers that prevent effective communication are also considered along with guides for preventing or overcoming such obstacles.

Competency	Content Outline	Activity Experience	IDCCC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page No.	
V. Goals and Objectives	V. Goals and Objectives	V. Goals and Objectives	MGT	23	795	720	V. Goals and Objectives
A. To define organizational objectives.	A. Definition of objectives	Lecture/discussion					A.-C. Given a stipulation, the student will be able to establish the goals and objectives of an organizational component and arrange in order of priority with 85% accuracy.
B. To prioritize organizational objectives.	B. Hierarchy of objectives	Have students make a list of goals they wish to achieve in the next five years. Discuss if they are verifiable or attainable.					
C. To define organizational goals.	C. Definition of goals	Have students take any program of any kind that they would like to see accomplished and draw a network of contributing programs and goals necessary for its accomplishment.					D.-E. Given a case, the student will be able to list the advantages of planning, the consequences of poor planning and discuss the relationship that exists between the two with 90% accuracy.
D. To establish a plan, anticipate problems, analyze problems, foresee probable effect and decide on action leading to the desired result.	D. Advantage of planning	Have students read the case study at the beginning of Chapter 11 in <i>Managing: A Contemporary Introduction</i> by Joseph Massie and John Douglas. The case could be used to stimulate thought and generate reactions for discussion.					
	1. Better coordination						
	2. More effective control of operations						
	3. Easier delegation						
	4. More economical use of resources						
	5. Increased personal effectiveness						
	6. Tendency toward improvement						
E. To analyze the effects of inadequate planning on organizational goals and objectives.	E. Consequences of poor planning						
	1. Lower production						
	2. Dissatisfaction among employees						
	3. High costs						
	4. Misunderstanding and confusion						
	5. Pressure from above						
	6. Poor quality work						
	7. Accidents						
	8. Lessened chance for promotion						

29

BUS 272

Competency	Content Outline	Activity Experience	IDEC SYSTEM				Evaluation
			Comp. Area	Lap. No.	Comp. No.	Page No.	
F. To describe the limitations inherent in goal setting.	F. Limitations of planning on establishing goals and objectives 1. Difficult to predict future 2. Tendency toward inflexibility 3. Expense 4. Time 5. Effect on individual initiative	Have students think about what they would like to accomplish in the next month based on place of residence, job, annual income, family, education, hobbies or talents and social life. Make a list of these objectives and draw up a time table for completing them. They should set up mileposts along the way to check their progress. During each week in the month, they should try to make some progress toward accomplishing the objectives on their list. At the end of the month, actual achievements can be compared with those they hoped to achieve. The class can discuss if they were good planners and managers of their time.					F. Given an essay-type test, the student will be able to state in writing four of the five limitations of planning on establishing goals and objectives with 80% accuracy.
G. To use the, "who, what, when, where and how" techniques in goal setting.	G. Techniques of goal setting 1. Key questions to answer in planning objectives and goals a. What is to be done? b. When will it be done? c. Where will it be done? d. Who will do it? e. How will it be done? 2. Role of supervisor in setting individual and group goals						G. Given a case, the student will be able to identify in writing the "who, what, when, where and how" that apply to the case with 90% accuracy.
H. To specify in writing, objectives in measurable terms.	H. Measurable objectives 1. When the above questions are answered in order to maximize understanding and acceptance by the employees, objectives should be stated so that the outcomes may be measured. 2. Objectives should be written so that: a. The desired behavior is identified by name b. Further define the desired behavior by describing the conditions under which the behavior will be expected to occur c. Specify the manner in which accepted performance will be evaluated						H. Given a problem, the student will be able to formulate and write applicable, measurable objectives with 80% accuracy.

30

BUS 272

392

391

BIBLIOGRAPHY

Goals and Objectives

Boyd, Bradford. Management-Minded Supervision. New York: McGraw-Hill Book Company, 1968.

Chapter 7 briefly discusses the individual employee's goals and objectives in relation to those of the organization.

Fulmer, Robert M. Supervision: Principles of Professional Management. Beverly Hills: Glencoe Press, 1976.

A typical management by objectives worksheet is illustrated in Chapter 8. Choosing objectives, communicating objectives and the three basic components of the management-by-objectives approach are also briefly discussed.

Hicks, Herbert G. The Management of Organization: A Systems and Human Resources Approach. 2nd ed. New York: McGraw-Hill Book Company, 1972.

Koontz, Harold and Cyril O'Donnell. Essentials of Management. New York: McGraw-Hill Book Company, 1974.

Chapter 6 discusses the benefits of managing by objectives, long- and short-range objectives, quantitative and qualitative objectives and the process of managing by objectives.

Massu, Joseph L. and John Douglas. Managing: A Contemporary Introduction. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1973.

Chapter 11 answers the questions: (1) What are objectives?, (2) In what areas of activity are they set?, (3) How are objectives set?, (4) Who sets objectives, (5) What is the relationship between personal and organizational goals?

Mager, Robert F. Preparing Instructional Objectives. Belmont, California: Fearon Publishers, 1962.

Newman, William. Administrative Action. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1963.

Objectives and goals and their advantages are well presented in Chapter 2. Broad objectives, multiple objectives, operating goals, safe versus courageous goals are discussed.

Odiorne, George S. Management by Objectives. New York: Pitman
Publishing Corporation, 1971.

Sartain, Aaron Quinn and Alton Wesley Baker. The Supervisor and His Job.
New York: McGraw-Hill Book Company, 1965.

The importance of objectives and long-range and immediate
objectives are briefly discussed in Chapter 4.

394

Competency	Content Outline	Activity Experience	JOCC SYSTEM				Evaluation
			Comp. Area	Lap. No.	Comp. No.	Page No.	
VI. Planning and Organizing	VI. Planning and Organizing	VI. Planning and Organizing					VI. Planning and Organizing
A. To distinguish the differences in the types of plans found in organizations.	A. Types of plans in the typical enterprise 1. Objectives - The ends toward which activity is aimed. 2. Policies - General statements or understandings which guide or channel thinking and action in decision making of subordinates. 3. Strategies - An overall plan to determine and communicate, through a system of major objectives and policies, a picture of what kind of enterprise is envisioned. 4. Procedures - Establish a customary method of handling future activities. 5. Rules - A course of required actions which are chosen from among alternatives. They are usually the simplest type of plan. 6. Programs - A complex of goals, policies, procedures, rules, task assignments, steps to be taken, resources to be employed and other elements necessary to carry out a given course of action. 7. Budgets - A statement of expected results expressed in numerical terms.	Lecture/discussion Have students play Mini-Game 9 in the Supervisor's Survival Kit. The purpose of the activity is to compare and evaluate the advantages and disadvantages of one system of organization over another. Have students read cases number 4 and 18 in the Supervisor and His Job. They should discuss and suggest what action should be taken in the given situations. Have students test their time perspective by having them answer the questions on page 32 in Supervision: Principles of Professional Management. The purpose of the test is to show that concepts of time are integral parts of one's personality and culture and to discover source of the meanings one attaches to time.					A. Given an essay-type question, the student will be able to list and define the seven types of plans with 90% accuracy.
B. To list the four important reasons necessary to plan effectively.	B. The importance of planning 1. To offset uncertainty and change 2. To focus attention on objectives 3. To gain economical operation 4. To facilitate control						B. Given a listing-type test, the student will be able to state in writing the four reasons for planning with a short explanation of each with 95% accuracy.

Competency	Content Outline	Activity Experience	IDEC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page No.	
C.-D. To identify the steps and features of a workable departmental plan.	C. Steps in planning 1. Being aware of opportunity 2. Establishing objectives 3. Premising 4. Determining alternative courses 5. Evaluating alternative courses 6. Selecting a course 7. Formulating derivative plan D. Features of a workable departmental plan 1. Make the plan reachable 2. Make the plan flexible 3. Include all elements or factors over which you do and do not have control 4. State the expected increase in productivity in clear terms Include previous figures for comparison 5. Tie the plan to management objectives	Have students make a list of everything they would like to accomplish in the next week. They could estimate the amount of time it will take to accomplish each goal. They may increase their total estimate by 40 percent to allow for unforeseen problems, interruptions and other time wasters. Time should be added for routine work, sleep, meals, recreation, etc. A discussion could be built around whether the students set too many or too few goals, whether they needed more hours in the day and how they could cut down some time and wasting activities to gain more time. Divide the class into groups of 4-6. Ask each group to make up one problem dealing with time use and discuss possible solutions to that problem. Each group could develop a short skit or other type of presentation to demonstrate its problem and solution to the rest of the class. Allow enough time for group discussion and time for each skit. Have a short discussion after each skit, then a longer discussion when all groups have presented their ideas.					C.-D. Given a case, the student will be able to list the steps in planning and apply the features to the steps to determine the workability of the plan.
E.-F. To recognize the value of time-saving techniques and prioritizing task accomplishment.	E. Guidelines for the use of time 1. Eliminate the little time-wasters 2. Delegate more 3. Look for and take short cuts 4. Group tasks together						E. Given a case, the student will be able to identify in writing time-savers and will list the task in the order of priority.

Competency	Content Outline	Activity Experience	IDEC SYSTEM				Evaluation
			Comp. Area	Lap. No.	Comp. No.	Page No.	
	F. Setting of priorities 1. Give priority to any problem that is rendering you ineffective 2. Do not focus only on your top priority task 3. Sometimes it is good to delay a problem or task, giving it a lower priority 4. Follow up on your priorities 5. Group in a meaningful sequence 6. Communication responsibilities should be near the top	Have students read the case problem presented in Chapter 26 of <u>What Every Supervisor Should Know</u>. This is a case study in human relations involving work schedules, with questions for students to think about. Have students make a list of as many activities and duties as they can that occupy a supervisor's time during the day. What suggestions can they make to find more time for planning? Have students read the case problems and answer the proposed questions in Chapter 11 of <u>Management-Minded Supervision</u> that deal with planning and organizing work. Some relevant case problems also appear in Chapter 8 of <u>Supervision: Concepts and Practices of Management</u>.					

BIBLIOGRAPHY

Planning and Organizing

Bittel, Lester R. What Every Supervisor Should Know. New York: McGraw-Hill Book Company, 1974.

Chapter 26 presents a discussion of planning the work schedule and explains the use of a Gantt chart and PERT chart. A case problem with discussion questions appears at the end of the chapter.

Boyd, Bradford. Management-Minded Supervision. New York: McGraw-Hill Book Company, 1976.

Chapter 11 provides an excellent discussion of a supervisor's planning and organizing of work. Highlighted are consequences of poor planning, benefits of good planning and key steps in formulating plans - Examples of a personal planning sheet and a personal time plan are included as well as relevant case problems.

Chapman, Elwood N. Supervisor's Survival Kit. Chicago: Science Research Associates, 1970.

Chapter 9 focuses on a formula of how a supervisor becomes an organized person. Features that should be included in departmental plans and rules for setting up a daily checklist appear in the chapter. A relevant Mini-Game is included at the end of the chapter.

Fulmer, Robert M. Supervision: Principles of Professional Management. Beverly Hills: Glencoe Press, 1976.

Tables presenting lists of time wasters, troubleshooting charts for time wasters and an illustration of a time inventory form highlight Chapter 5's discussion of managing time. There is also a test to determine one's time perspective.

Haimann, Theo and Raymond L. Hilgert. Supervision: Concepts and Practices of Management. Cincinnati: South-Western Publishing Co., 1972.

A thorough discussion of planning on the supervisory level is presented in Chapter 8. Several tactics are suggested to facilitate the success of a plan along with plans to efficiently utilize available resources. Case problems are included.

Koontz, Harold and Cyril O'Donnell. Essentials of Management. New York: McGraw-Hill Book Company, 1974.

The nature and purpose of planning is well presented in Chapter 5 through a discussion of the types of plans in the typical enterprise, the importance of planning and the steps in planning.

Sartain, Aaron Quinn and Alton Wesley Baker. The Supervisor and His Job.
New York: McGraw-Hill Book Company, 1965.

Chapter 14 summarizes the aspects of planning and the dynamics
of planning in relation to factors aiding acceptance of change,
flexibility of planning, time factors and long range planning.

Spiegel, William R. and others. Elements of Supervision. New York:
John Wiley and Sons, Inc., 1957.

Chapter 6 gives a good but general overview of the topic of
planning the work of the department.

Competency	Content Outline	Activity Experience	DECC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page No.	
VII. Training and Instruction	VII. Training and Instruction	VII. Training and Instruction	MGT	9	606	316	VII. Training and Instruction
A.-B. To be able to define the concepts of learning and training through an educational process.	A. Definition of learning	Lecture/discussion		10	607	332	A.-H. Given a case problem, the student will be able to develop standards, identify needs, determine objectives, develop suggested curriculum materials, select methods and materials, identify instructional resources and suggest evaluative criteria.
				5	612	151	
				10	690	341	
				9	691	324	
				8	745	283	
				13	766	414	
	1. A change in an individual, a modification of behavior on an addition of something new, by means of activity, observation or some form of training.	Have students play Mini-Game 14 presented in the Supervisor's Survival Kit by Elwood N. Chapman. The purpose of the activity is to illustrate good teaching techniques through observing a demonstration contest between two students using the basic four-step process explained in the chapter.	OPER	13	635	530	
				2	788	82	
	2. Learning may be pleasant or unpleasant	Have students read and discuss the case problems at the beginning and end of Chapter 8 in Management-Minded Supervision by Bradford Boyd. The cases are related to training problems and give the student the opportunity to test the principles of management-mindedness as supervisors.					
	3. Learning may be planned or incidental	Have students read and discuss the case problem presented in Chapter 13 of What Every Supervisor Should Know by Lester R. Bittel. This is a case study in human relations involving employee training with questions for students to think about.					
	4. Learning may be consciously or unconsciously brought about.						
	B. Definition of training or education						
	1. Any attempt to bring about changes in behavior						
	2. The process by which (1) behavior of an individual is changed (2) the change is effected over a specified period of time (3) there is the possibility of measuring the change						
	C. To be able to compare the cognitive, affective and psychomotor components of learning.						
	C. Components of learning						
	1. Cognitive						
	2. Affective						
	3. Psychomotor						

Competency	Content Outline	Activity Experience	IDEC SYSTEM				Evaluation
			Comp. Area	Lap. No.	Comp. No.	Page No.	
D. To be able to describe the facts and principles of how adults learn.	D. How adults learn 1. Trial and error 2. Observation 3. By doing 4. Insight-development						
E.-F. To be able to identify common errors committed by supervisors and factors that contribute to job training.	E. Common errors in teaching people their jobs 1. Feeding too much at one time 2. Telling without demonstrating 3. Showing a lack of patience 4. Failure to prepare to instruct 5. Failure to build in feedback 6. Failure to reduce tension						
	F. Factors which are important in the learning process 1. Acceptance that all human beings can learn 2. The individual must be motivated 3. Learning is an active process, not passive 4. Normally, the learner must have guidance 5. Appropriate materials for sequential learning must be provided						

Competency	Content Outline	Activity Experience	DEVELOPMENT SYSTEM				Evaluation
			Comp. Area	Map No.	Comp. No.	Page No.	
	6. Time must be provided to practice learning 7. Learning methods, if possible, should be varied to avoid boredom 8. The learner must secure satisfaction from the learning 9. The learner must get reinforcement of the correct behavior 10. Standards of performance should be set for the learner 11. A recognition that there are different levels of learning and that these take different times and methods						
G. To be able to identify the advantages and disadvantages of instructional techniques.	G. Instructional techniques 1. Lecture 2. Lecture-demonstration 3. Demonstration-performance 4. Group discussion 5. Role playing						
H. To be able to apply the theory and procedures for conducting a training program.	H. Suggested process for conducting a training program 1. Develop job standards 2. Identify needs 3. Determine objectives 4. Develop curriculum 5. Select methods and materials 6. Obtain instructional resources 7. Conduct training 8. Evaluate and feedback						

BIBLIOGRAPHY

Training and Instruction

Bittel, Lester R. Improving Supervisory Performance. New York: McGraw-Hill Book Company, 1976.

Chapter 7 lists and explains the Job Instruction Training, a simple four-step guide for almost every kind of training situation.

Bittel, Lester R. What Every Supervisor Should Know. 3rd ed. New York: McGraw-Hill Book Company, 1974.

Training employees to work well is thoroughly discussed in Chapter 13. Instructional techniques are presented as well as an example of a job break-down sheet.

Boyd, Bradford B. Management-Minded Supervision. 2nd ed. New York: McGraw-Hill Book Company, 1976.

Training for results is the topic of Chapter 8. Factors which facilitate and inhibit learning are discussed. A systematic model for instruction is also given.

Chapman, Elwood N. Supervisor's Survival Kit. Chicago: Science Research Associates, Inc., 1970.

A simple step-by-step approach of how to be a good teacher as well as supervisor is presented in Chapter 14. A Mini-Game is included that is designed to illustrate good teaching techniques.

Echer, Paul and others. Handbook for Supervisors. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1959.

Chapter 7 thoroughly discusses the topic of how adults learn. Chapter 8 thoroughly discusses job instruction training including methods of training, developing a training program and an outline for carrying out an indoctrination program is presented.

Nadler, Leonard. A Process of Training. Washington, D.C.: Leadership Resources, Inc., 1968.

This journal presents one way of looking at training - through a process. An eight step orderly process is diagramed and discussed.

Newman, William H. Administrative Action. Englewood Cliffs, New Jersey:

Chapter 21 discusses the characteristics of good instruction, the follow through of instruction, the standard practice and indoctrination and consultative direction.

Rose, Homer C. The Instructor and His Job. Chicago: American Technical Society, 1972.

The book is comprehensive but simply written to give practical assistance to instructors, supervisors and others who are preparing to teach. It is devoted to the basic principles and specific techniques of training that are applicable to all programs and training situations. Influences on learning are discussed.

Spriegel, William R. and others. Elements of Supervision. New York: John Wiley and Sons, Inc., 1966.

The importance of instructing, methods of learning and various methods of training are examined in Chapter 11.

Staton, Thomas F. How to Instruct Successfully. New York: McGraw-Hill Book Company, 1960.

The book tells how to prepare and present a period or a course of instruction. The basic principles of educational psychology are covered briefly before going into practical methods of teaching procedures. It is specifically intended for those who will be teaching adults.

This, Leslie E. and Gordon L. Lippitt. Learning Theories and Training. Washington, D.C.: Leadership Resources, Inc., 1966.

This journal presents a good overview of learning theories and their implication for the training director. Motivation, transfer of learning, adult learning, conditions for learning and change on the job are discussed.

Fulmer, Robert M. Supervision: Principles of Professional Management. Beverly Hills: Glencoe Press, 1976.

A typical appraisal rating form is illustrated with a very brief discussion on evaluating performance in Chapter 11.

Gellerman, Saul W. The Management of Human Relations. New York: Holt, Rinehart & Winston, Inc., 1966.

Some reasons for and against appraisal and counseling are presented in Chapter 7. The ambiguity of telling a man where he stands within an organization is also pointed out.

Haimann, Theo and Raymond L. Hilgert. Supervision: Concepts and Practices of Management. Cincinnati: South-Western Publishing Company, 1972.

Chapter 14 briefly discusses employee appraisals by stating the advantages of a formal system, the evaluation interview and presents example appraisal forms.

Sartain, Aaron Quinn and Alton W. Baker. The Supervisor and His Job. New York: McGraw-Hill Book Company, 1965.

Chapter 21 discusses various plans for evaluating subordinates with much emphasis placed on the merit rating plan.

Smith, Henry Clay. Psychology of Industrial Behavior. New York: McGraw-Hill Book Company, 1964.

Chapter 6 deals with the questions (1) what ratings are, (2) how they can be improved and (3) what are the best ways of using them. Companies' use of the developmental interview, their efforts to foster more constructive human relationships within the organization and their employment of professional help in these activities are the topics of Chapter 7.

Stewart, Charles J. and William B. Cash. Interviewing: Principles and Practices. Dubuque, Iowa: Wm. C. Brown Company Publishers, 1974.

Chapters 7 and 8 present a thorough discussion of appraisal interviewing and counseling interviewing. There are also sample interviews and role-playing cases.

Competency	Content Outline	Activity Experience	IDECC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page No.	
VIII. Evaluation and Counseling	VIII. Evaluation and Counseling	VIII. Evaluation and Counseling	MGT	12	610	378	VIII. Evaluation and Counseling
A. To identify and apply the guidelines to effective counseling.	A. Effective counseling guidelines	Lecture/discussion		7	611	269	Given a case, the student will be able to specify in writing the purpose, time, place, approach and techniques applicable to the counseling session with 85% accuracy.
	1. Right purpose - Purposes for counseling	Have students keep a diary containing experiences they have been involved in or come in contact with at work in which there has been conflict in the area of evaluation and counseling or delegation. Solutions to the conflict could be discussed in class.		12	729	397	
	a. To strengthen, maintain or restore a working relationship between you and one of your employees						
	b. To motivate employees to greater productivity						
	c. To resolve personality conflicts	Have students play Mini-Game 8 presented in the Supervisor's Survival Kit by Elwood W. Chapman. The purpose of the role-playing activity is to compare and rate two counseling techniques in a difficult and sensitive situation.					
	d. To discipline an employee						
	e. Orientation and termination counseling						
	2. Right time - Warnings to help choose the right time	Have students play Mini-Game 12 presented in the Supervisor's Survival Kit. The purpose of this activity is to provide experience and insight into the importance of the appraisal interview.					
	a. Do not intervene with counseling until you are sure it is necessary						
	b. Don't initiate a counseling period when you are upset, frustrated or hot under the collar yourself	Aaron Sartain and Alton Baker's book, The Supervisor and His Job, presents case problems related to evaluating employees. Case Nos. 22, 23, 24, 25, 26 and 27 would be ideal for group or class discussion.					
	c. Certain times of the day are not conducive to effective counseling						
	3. Right place						
	a. Private office						
	b. Coffee-break counseling						

Competency	Content Outline	Activity Experience	IDECC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page No.	
	4. Right approach a. At least one hour before the interview, invite the employee pleasantly to drop by your office or other specific place b. When the employee shows up, greet him pleasantly and see that he is comfortably seated c. Lay your cards on the table gently 5. Right techniques a. Directive counseling - When the supervisor does most of the talking and draws a rather firm line on the direction the interview will take. Used in the following situations: (1) When there is a violation of company rules or policies (2) When mistakes need to be corrected (3) When employee hostility (toward you) has reached the stage where it can no longer be tolerated						

Competency	Content Outline	Activity Experience	IDEC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page No.	
	b. Nondirective counseling - A soft approach designed to get any hidden problems out into the open or where no problem exists, to get a climate for free and constructive discussion on any matter important to the employee - Best when used in the following situations: (1) When an employee appears to have lost his touch, or his positive attitude over a sustained period of time and as a result productivity is down (2) When you want to strengthen or restore a given relationship (3) When you feel you can motivate an employee to greater productivity B. To identify and apply the guidelines for appraising employee performance.	Collect rating forms that companies use for appraisal interviews. How do forms differ from company to company? Why are there differences? Have students read and discuss the case problem related to "Appraising Employee Performance" that is presented in <u>What Every Supervisor Should Know</u> by Lester R. Bittel. This case study in human relations involves employee performance, with questions for discussion.					
	B. Effective appraisal guidelines 1. Accept the system and form the way it is 2. Turn the review into a profitable counseling period 3. Don't take the easy way out 4. Follow these tips as you complete the rating form						B. Given a typical appraisal rating form and facts regarding employee attitudes and performance, the student will be able to apply the effective guidelines in completing the form with 85% accuracy.

Competency

Content Outline

Activity Experience

IDEC SYSTEM
Comp. Lap Comp. Page
Area No. No. No.

Evaluation

- a. You are appraising the employee's work, not his personality
- b. Avoid the wish syndrome where you base your evaluation more on the potential abilities of the employee rather than on actual performance
- c. Base your evaluation on the employee's average performance
- d. Avoid the halo effect
- e. Avoid the error of central tendency
5. Always discuss the rating openly with the employee
6. Give the appraisal all the time it deserves
7. Protect yourself on "below standard" ratings
8. Use appraisal as a positive tool
9. Be careful with promises
10. Follow up with compliments or further counseling
11. Do the necessary paper work on time
12. Take special pains with the probationary appraisal

51

BUS 272

Competency	Content Outline	Activity Experience	DECC SYSTEM				Evaluation
			Comp. Area	Lap. No.	Comp. No.	Page No.	
C. To list the advantages and methods of a formal appraisal system.	C. Formal appraisals 1. Advantages of a formal system a. It reduces the chances of personal biases distorting the rating. b. It forces the supervisor to observe and scrutinize his subordinates from the point of view of how well the employee is performing his job and also what can be done to improve his performance. c. It may serve to evaluate and improve the supervisor's own performance. d. It lets the employee know how well he is doing and what he can do to better his work performance. e. It is an important incentive. 2. Methods of employee evaluation a. Rating scales - The rater indicates how little or how much of a characteristic a worker has. b. Ranking method - The rater lists the employees from the one who has the most to the one who has the least of the characteristic.						C. Given a listing-type test, the student will be able to specify in writing the advantages and methods of a formal employee evaluation.

52

BUS 272

Competency	Content/Outline	Activity Experience	IDECC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page No.	
	c. The forced-choice method - It presents the rater with sets of favorable or unfavorable phrases in which the rater is forced to choose from equally favorable (or unfavorable) phrases the ones that are most descriptive and least descriptive of the employee being rated D. To outline the steps for preparing, initiating, organizing and closing the appraisal interview.						
	D. Formal appraisal form and practice 1. Preparation for the interview a. Know what the appraisal will and will not include b. Inform the interviewee of what the appraisal will and will not include c. Check all available information on the employee well in advance of interview d. Enter the interview with a positive attitude 2. Beginning the interview - Suggestions for building rapport a. Begin with a brief outline of how you want to conduct the interview b. Ask for employee's reaction to his rating						D. Given an essay-type question, the student will be able to list the steps to be followed in the preparation, beginning, organizing and closing the interview with 80% accuracy.

Competency	Content Outline	Activity Experience	IDEC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page No.	
	c. Ask employee about problems he may have encountered during the last rating period that might account for his below average rating d. Begin with his production record e. Ask employee to appraise himself using the performance rating form						
	3. Organization of the interview a. Adapt the appraisal process to fit the employee b. Summarize before moving to a new area of discussion c. Refer to the progress the worker has made since the preceding evaluation d. Compliment worker on his achievements e. Proceed to the areas which need improvement f. Stress the fact that everybody in the same job in the department is rated according to the same standards g. Document ratings by citing specific illustrations h. Relate the factors being rated to the actual demands of the job i. Be specific concerning future development plans						

Competency

Content Outline

Activity Experience

IRCC SYSTEM

Comp. Area	Lap No.	Comp. No.	Page No.
------------	---------	-----------	----------

Evaluation

- j. Provide each employee with an opportunity to ask questions
- k. Answer questions fully
- 4. Closing the interview
 - a. Agree upon some mutually established goals in those areas where the employee needs improvement
 - b. Make clear that a signature merely confirms that the interview took place
 - c. Leave an impression that enhances a sense of trust and open communication
 - d. Give him a copy of the rating form
 - e. Summarize in writing a plan for the coming time period

54

242 BUS 272

BIBLIOGRAPHY

Evaluation and Counseling

Bittel, Lester R. What Every Supervisor Should Know. New York: McGraw-Hill Book Company, 1974.

Chapter 12 presents a detailed discussion on appraising employee performance. An employee merit rating form is illustrated and a related case problem is presented.

Boyd, Bradford B. Management-Minded Supervision. New York: McGraw-Hill Book Company, 1968.

Chapter 12 discusses reasons for performance appraisals, objections to performance appraisals, approaches to the appraisal system and the appraisal interview. The chapter includes a related study.

Chapman, Elwood N. Supervisor's Survival Kit. Chicago: Science Research Associates, Inc., 1970.

Chapter 8 presents the purposes that should be served by a supervisor's counseling and guidelines to follow. A Mini-Game designed to compare and rate two counseling techniques in a difficult and sensitive situation is included. Chapter 12 discusses the formal appraisal and provides experience and insight into the importance of the appraisal interview through the use of a Mini-Game.

Davis, Keith. Human Relations at Work. New York: McGraw-Hill Book Company, 1967.

Chapter 21 discusses the need for counseling and various types of counseling.

Echer, Paul and others. Handbook for Supervisors. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1959.

Chapter 9 deals with formal employee evaluation; namely, evaluating methods, the performance interview and understanding employee evaluation.

Fear, Richard A. The Evaluation Interview. New York: McGraw-Hill Book Company, Inc., 1958.

The entire book is devoted to teaching one to conduct a successful interview and how to interpret information received from the interview.

Competency	Content Outline	Activity Experience	IOECC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page No.	
IX. Delegation	IX. Delegation	IX. Delegation					IX. Delegation
A. To recognize the reasons that supervisors may not delegate.	A. Reasons for failure to delegate	Lecture/discussion					A. Given a series of cases, the student will be able to designate in writing the reasons for lack of delegation in each sample case with 90% accuracy.
	1. No faith in subordinates	Have students participate in Mini-Game 6 presented in the <u>Supervisor's Survival Kit</u> . The purpose of the game is to provide understanding of the problem of delegating and training in solving it.					
	2. Fear of supervisors						
	3. Desire for personal credit	Have students read and discuss the case problem and questions presented in Chapter 8 of <u>What Every Supervisor Should Know</u> by Lester R. Bittel. This is a case study in human relations involving organization and the first-line supervisor.					B. Given a model, the student will be able to specify in writing when delegation should occur with 80% accuracy.
	4. Misjudgment of time						
B. To determine when to delegate.	B. Model to determine the need and level of delegation	Have students keep a diary containing experiences they have been involved in or come in contact with at work in which there has been conflict in the area of delegation. Solutions to the conflict could be discussed in class.					Given an objective-type test, the student will be able to identify specific jobs which should be delegated with 85% accuracy.
To utilize a model to decide what jobs should be delegated.	1. When should the supervisor delegate						
	a. When the supervisor can use more time for work only he can do						
	b. When delegating a job to a given employee will help his morale and cause him to live closer to his potential						
	c. When it will not show undue favoritism or seriously damage human relationships						
	d. When the supervisor is willing to take time and make the efforts to do a skillful job of delegating						
	e. When the supervisor is under pressure and he must relieve some responsibilities in order to protect his physical and mental health						

Competency	Content Outline	Activity Experience	IDEC SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Pano No.	
	2. Model for deciding what jobs to target for delegation a. You must do b. You should do, but someone else could help you c. You could do, but others could do if given an opportunity d. Others should do, but you can help out in an emergency e. Others must do						

BIBLIOGRAPHY

Delegation

Sartain, Aaron Quinn and Alton Wesley Baker. The Supervisor and His Job. New York: McGraw-Hill Book Company, 1965.

The nature of authority of position, personal authority, unity of command and the principle of division of work are examined in Chapter 4.

Bittel, Lester R. What Every Supervisor Should Know. New York: McGraw-Hill Book Company, 1974.

Chapter 8 distinguishes between authority, responsibility and accountability. Tables of organization are presented as well as a relevant case problem.

Chapman, Elwood N. Supervisor's Survival Kit. Chicago: Science Research Associates, Inc., 1970.

Chapter 6 discusses why supervisors fail to delegate and why supervisors should delegate. A Mini-Game is presented to provide understanding of the problem of delegating and training in solving the problem.

Haimann, Theo and Raymond L. Hilgert. Supervision: Concepts and Practices of Management. Cincinnati: South-Western Publishing Company, 1972.

Chapter 6 presents a good definition and discussion of authority, delegation of authority, decentralization, benefits from effective supervisory delegation, the general approach to supervision and adverse effects of an authorization approach.

How to Delegate Effectively. New York: Argyle Publishing Corporation, 1968.

Competency	Content Outline	Activity Experience	IDEP SYSTEM				Evaluation
			Comp. Area	Lap No.	Comp. No.	Page No.	
X. Problem Solving	X. Problem Solving	X. Problem Solving	OPER	15 22	617 679	675 1124	X. Problem Solving
A.-B. To identify methods for handling minor and major job-oriented problems.	A. Techniques for handling minor job-oriented problems 1. Restate the problem and review facts 2. Compare several possibilities and make the best choice 3. Announce the decision and have confidence B. Techniques for handling major job-oriented problems 1. Avoid a quick decision 2. Write all possible solutions 3. Consult others if necessary 4. Select possible solution and ask opinion of others 5. Follow up	Lecture/discussion Have students play Mini-Game 13 in the Supervisor's Survival Kit. The purpose of this exercise is to provide experience in making decisions under pressure. Have students read and discuss case problems 24 and 25 in Supervision: Concepts and Practices of Management. These case studies involve situations dealing with labor relations and adjusting grievances. Have students discuss from their own experience, a grievance that went to the second or third level. They should decide if it would have been possible for the supervisor to have settled it without compromising management's rights.					A.-B. Given a case, the student will identify in writing the techniques to be employed in solving a job-oriented problem with 90% accuracy.
C.-D. To identify methods for handling minor and major people-oriented problems.	C. Techniques for solving simple people-oriented problems 1. Is there a written policy on the matter? 2. Will relationships with others involved be damaged? 3. Will health and safety of others be damaged?	The case problems at the end of Chapter 10 in Management-Minded Supervision provide good discussions on the topic of handling complaints and grievances. Have students respond to the case problem presented in Chapter 18 of What Every Supervisor Should Know. This is a case study in human relations involving grievances, with questions for thought and discussion.					C.-D. Given a case, the student will identify in writing the techniques to be employed in solving a people-oriented problem with 90% accuracy.

Competency

Content Outline

Activity Experience

IDEC SYSTEM

Comp.
AreaLap
No.Comp.
No.Page
No.

Evaluation

D. Techniques for solving complicated
people-oriented problems.

1. Listen carefully to all
problems or complaints
2. Gather information from
all sides
3. Weigh all facts carefully
4. Keep all communication lines
open
5. Follow up

BIBLIOGRAPHY

Problem Solving

Bittel, Lester R. What Every Supervisor Should Know. New York: McGraw-Hill Book Company, 1974.

Chapter 18 presents a good general discussion on handling gripes and avoiding grievances. A table of common grievances and their courses is illustrated. A case problem for analysis and discussion is included in the chapter.

Boyd, Bradford B. Management-Minded Supervision. New York: McGraw-Hill Book Company, 1976.

Chapter 20 begins with the anatomy of a grievance and then explains a step by step approach to the grievance procedure. The discussion is intensified by presenting several case problems.

Chapman, Elwood N. Supervisor's Survival Kit. Chicago: Science Research Associates, Inc., 1970.

Techniques for handling both minor and major job-oriented problems and techniques for solving both simple and complicated people-oriented problems are discussed in Chapter 13. A relevant Mini-Game is presented.

Haimann, Theo and Raymond L. Hilgert. Supervision: Concepts and Practices of Management. Cincinnati: South-Western Publishing Company, 1972.

A good discussion on adjusting grievances is presented in Chapter 20 as a checklist of how to achieve satisfactory adjustments of grievances.

Hannaford, Earle S. Supervisors Guide to Human Relations. Chicago: National Safety Council, 1967.

Chapter 4 discusses possible causes of employee dissatisfaction and suggests corrections to be taken.

BIBLIOGRAPHY

1. Books

- Textbooks: Benton, Lewis. Supervision and Management. New York: McGraw-Hill Book Company, Current Edition.
- Bittel, Lester R. Improving Supervisory Performance. New York: McGraw-Hill Book Company, Current Edition.
- Bittel, Lester R. What Every Supervisor Should Know. New York: McGraw-Hill Book Company, Current Edition.
- Black, James Menzies. The Basics of Supervisory Management: Mastering the Art of Effective Supervision. New York: McGraw-Hill Book Company, Current Edition.
- Boyd, Bradford B. Management-Minded Supervision. New York: McGraw-Hill Book Company, Current Edition.
- Cone, William F. Supervising Employees Effectively. Reading, Massachusetts: Addison-Wesley Publishing Co., Current Edition.
- Ficker, Victor B. Effective Supervision. Columbus, Ohio: Charles E. Merrill Publishing Company, Current Edition.
- Fulmer, Robert M. Supervision: Principles of Professional Management. Beverly Hills: Glencoe Press, Current Edition.
- George, Jr., Claude S. Supervision in Action: The Art of Being Effective. Englewood Cliffs, New Jersey: Reston Publishing Co., Inc., Current Edition.
- Haimann, Theo and Raymond L. Hilgert. Supervision: Concepts and Practices of Management. Cincinnati: South-Western Publishing Co., Current Edition.
- Harris, Jr., O. Jeff. Managing People at Work. Santa Barbara, California: John Wiley and Sons, Inc., Current Edition.
- Newport, M. Gene. Supervisory Management: Tools & Techniques. St. Paul, Minnesota: West Publishing Co., Current Edition.
- Plunkett, W. Richard. Supervision: The Direction of People at Work. Dubuque, Iowa: Wm. C. Brown Company Publishers, Current Edition.

Rosen, Ned. Supervision: A Behavioral View. Columbus, Ohio: Grid Publishing, Current Edition.

Sartain, Aaron Quinn and Alton Wesley Baker. The Supervisor and His Job. New York: McGraw-Hill Book Company, Current Edition.

Seimer, Stanley J. Elements of Supervision. Columbus, Ohio: Grid Publishing, Current Edition.

Spiegel, William R. and others. Elements of Supervision. New York: John Wiley and Sons, Inc., Current Edition.

Terry, George R. Supervisory Management. Homewood, Illinois: Richard D. Irwin, Inc., Current Edition.

Reference Books: Bittel, Lester R. The Nine Master Keys of Management. New York: McGraw-Hill Book Company, Current Edition.

Chapman, Elwood N. Supervisor's Survival Kit. Chicago: Science Research Associates, Inc., Current Edition.

Chapman, Elwood N. Your Attitude is Showing: A Primer on Human Relations. Chicago: Science Research Associates, Inc., Current Edition.

Cooper, Alfred M. How to Supervise People. New York: McGraw-Hill Book Company, Current Edition.

Davis, Keith. Human Relations at Work. New York: McGraw-Hill Book Company, Current Edition.

Dowling, William F. and Leonard R. Sayles. How Managers Motivate: The Imperatives of Supervision. New York: McGraw-Hill Book Company, Current Edition.

Echer, Paul and others. Handbook For Supervisors. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.

Eckles, Robert W. Supervisory Management: A Short Course for Supervisors. New York: John Wiley & Sons, Inc., Current Edition.

Eckles, Robert W. and others. Essentials of Management for First-Line Supervision. New York: John Wiley & Sons, Inc., Current Edition.

Fear, Richard A. The Evaluation Interview. New York: McGraw-Hill Book Company, Current Edition.

Fiedler, Fred E. and others. Improving Leadership Effectiveness: The Leader Match Concept. New York: John Wiley & Sons, Inc., Current Edition.

Gellerman, Saul W. The Management of Human Relations. New York: Holt, Rinehart & Winston, Inc., Current Edition.

Gibson, James L. and others. Organizations: Behavior, Structure, Processes. Dallas, Texas: Business Publications, Inc., Current Edition.

Hannaford, Earle S. Supervisors Guide to Human Relations. Chicago: National Safety Council, Current Edition.

Hicks, Herbert G. The Management of Organization: A Systems and Human Resources Approach. New York: McGraw-Hill Book Company, Current Edition.

How to Delegate Effectively. New York: Argyle Publishing Corporation, Current Edition.

Jennings, Eugene E. An Anatomy of Leadership: Princes, Heroes and Supermen. New York: McGraw-Hill Book Company, Current Edition.

Koontz, Harold and Cyril O'Donnell. Essentials of Management. New York: McGraw-Hill Book Company, Current Edition.

Mager, Robert F. Preparing Instructional Objectives. Belmont, California: Fearon Publishers, Current Edition.

Massu, Joseph L. and John Douglas. Managing: A Contemporary Introduction. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.

Newman, William H. Administrative Action. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.

Nutt, Merle C. Meeting the Challenge of Supervision. Hicksville, New York: Exposition Press, Incorporated, Current Edition.

Odiorne, George S. Management by Objectives. New York: Pitman Publishing Corporation, Current Edition.

Rath, Patricia M. Supervising on the Job: A Self-Study Guide for Students. Danville, Illinois: Interstate, Current Edition.

Rose, Homer C. The Instructor and His Job. Chicago: American Technical Society, Current Edition.

Stewart, Charles J. and William B. Cash. Interviewing: Principles and Practices. Dubuque, Iowa: Wm. C. Brown Company Publishers, Current Edition.

Smith, Henry Clay. Psychology of Industrial Behavior. New York: McGraw-Hill Book Company, Current Edition.

Staton, Thomas F. How to Instruct Successfully. New York: McGraw-Hill Book Company, Current Edition.

Steinmetz, Lawrence L. and H. Ralph Todd, Jr. First-Line Management. Dallas, Texas: Business Publications, Inc., Current Edition.

This, Leslie E. and Gordon L. Lippitt. Learning Theories and Training. Washington, D.C.: Leadership Resources, Inc., Current Edition.

Trewatha, Robert L. and M. Gene Newport. Management: Functions and Behavior. Dallas, Texas: Business Publications, Inc., Current Edition.

Uris, Auren. Techniques of Leadership. New York: McGraw-Hill Book Company, Current Edition.

Wasmuth, William and George deLodzia. Dynamics of Supervision: Organizational Cases and Intrigues. Columbus, Ohio: Grid Publishing, Current Edition.

2. Periodicals

Administrative Management. Geyer-McAllister Publications, Inc., 51 Madison Avenue, New York, New York, 10010. Monthly. \$12 per year.

The Balance Sheet. South-Western Publishing Co., 5101 Madison Road, Cincinnati, Ohio, 45227. Monthly during academic year. No charge. (Instructor oriented, basically secondary)

Business Education Forum. 1906 Association Drive, Reston, Virginia, 22091. Monthly, October - May. \$5 per year, members only.

Business Education World. 1221 Avenue of the Americas, New York, New York, 10020. Monthly, September - May. No charge. (Instructor oriented)

Business Week. McGraw-Hill Book Company, 1221 Avenue of the Americas, New York, New York, 10020. Weekly. \$12 per year.

Collegiate News and Views. South-Western Publishing Co., Cincinnati, Ohio, 45227. Monthly during academic year. No charge. (Instructor oriented, basically postsecondary)

Fortune. Time, Incorporated, Time and Life Building, New York, New York, 10020. Monthly. \$12 per year.

Journal of Business. University of Chicago Press, 5801 Ellis Avenue, Chicago, Illinois, 60657. Quarterly. \$8 per year.

Management Review. American Management Association, 135 West 50 Street, New York, New York, 10020. Monthly. \$10 per year, members; \$15 per year, non-members.

Management World. Administrative Management Society, Maryland Road, Willow Grove, Pennsylvania, 19090. Monthly. \$12 per year.

Nation's Business. Chamber of Commerce of the United States, 1615 H Street, Northwest, Washington, DC, 20006. Monthly. \$9.95 per year.

Successful Supervisor. Dartnell, 4660 Ravenswood Avenue, Chicago, Illinois, 60640. Bimonthly. \$20 per year (estimated).

Supervisor's Bulletin. National Foremen's Institute, 24 Rope Ferry Road, Waterford, Connecticut, 06385. Semimonthly. \$15 per year.

Supervisory Management. American Management Association, 135 West 50 Street, New York, New York, 10020. Monthly. \$10 per year, members; \$14 per year, non-members.

3. Audiovisual Aids

Bittel, Lester R. Shenandoah Management Games for Supervisors. New York: McGraw-Hill Book Company, Current Edition.

Reece, Barry and Gerald Manning. Wilson RV - An In-Basket Simulation for Supervisory and Management Development. New York: McGraw-Hill Book Company, Current Edition.

4. Other Sources

American Management Association, 135 West 50 Street, New York, New York, 10020.

Administrative Management Society, Willow Grove, Pennsylvania, 19090.

National Management Association, 2210 Arbor Boulevard, Dayton, Ohio, 45439, (513) 294-0421.

Nadler, Leonard. A Process of Training. Washington, D.C.: Leadership Resources, Inc., Current Edition.

Schmidt, Warren H. "Styles of Leadership", Looking Into Leadership: Executive Library. Washington, D.C.: Leadership Resources, Inc., Current Edition.

435

SYLLABUS FOR
RECORDS MANAGEMENT
BUSINESS 112

This syllabus was developed by Lyllis Vuncannon, Athens Drive Senior High School, (formerly at Sanderson High School) Raleigh with input from and review by Wanda Russell, Guilford Technical Institute, Jamestown; Jean Woolard, Plymouth High School, Plymouth and Carolyn Brown, Burlington Industries, Greensboro and the Secretarial Science Curriculum Advisory Committee.

Appreciation is expressed to Ms. Vuncannon, the other contributors, their respective institutions and the Advisory Committee for their assistance and cooperation.

BUSINESS 112 RECORDS MANAGEMENT

I. DESCRIPTION OF COURSE:

The student will be able to apply the fundamentals of indexing and filing and realize the importance of filing as a basic tool of management. Theory and practice will be combined by the use of miniature letters, filing boxes and guides. Topics studied include alphabetic, numeric, geographic, subject and subject-decimal filing systems.

II. COURSE OBJECTIVES:

Given the materials as presented in this course, the student will be able to:

1. Apply basic principle procedures of filing and records storage and control.
2. Demonstrate knowledge of alphabetic, numeric, geographic, subject and subject-decimal filing systems.
3. Store and retrieve special records.
4. Demonstrate general knowledge of the concept, records management.
5. Apply the Records Cycle - creation, retention, transfer, disposal.
6. Purchase and use equipment and supplies used in a records system.

III. COURSE OVERVIEW:

- A. Coding documents and correspondence
- B. Cross-referencing procedures
- C. Processing materials for filing
- D. Filing materials
- E. Processing and filing ledger cards
- F. Central index files
- G. Tickler file
- H. Requests for records or files
- I. Updating files
- J. Inactive files
- K. Obsolete files
- L. Revising filing systems
- M. Filing equipment and supplies
- N. Microfiche
- O. Microfilm

IV. CREDITS, HOURS, PREREQUISITES:

- A. Three-five (3-5) quarter hours credit
- B. Three-five (3-5) class hours per week; zero-four (0-4) laboratory hours per week
- C. Prerequisite: None

V. EVALUATION:

Evaluation is based on the completion of stated objectives and should include one or more of the following:

- A. Objective-type tests
- B. Discussion-type tests
- C. Combination of A and B
- D. Class projects and problem-solving situations

COMPETENCIES FOR RECORDS MANAGEMENT

Code documents and correspondence.

Implement cross-referencing procedures.

Process materials for filing.

File materials.

Update central index files.

Maintain a tickler file.

Process requests for records or files.

Update files.

Maintain inactive files and dispose of obsolete materials.

Revise filing systems.

Maintain appropriate filing equipment and supplies.

Use microfilm and microfiche to secure desired information.

Competency

Content Outline

Activity Experience

Evaluation

Code documents and correspondence according to specific rules.

I. Coding Documents and Correspondence

- A. Become familiar with alphabetic filing rules
- B. Learn specific coding rules
- C. Scan materials to be filed
- D. Code according to established rules
- E. Indicate cross-reference where needed

Master rules for alphabetic filing

1. Master rules for alphabetic filing.
2. Learn to scan and code material to be filed.
3. Learn cross-referencing rules.
4. Provide practice exercises for application of these principles by setting up 3 x 5 card file with 100 names and addresses, each with a code number for future reference.

Given 30 pieces of material to be filed, scan, code and indicate cross-referencing by specific coding rules.

(Time limit: 10 - 15 minutes;
Accuracy: 100%)

Competency	Content Outline	Activity Experience	Evaluation
Implement cross-referencing procedures.	II. Cross-Referencing Procedures A. Scan material to be filed. B. Determine needed cross-referencing during coding. C. Indicate on the document cross-referencing to be used. D. Prepare cross-reference form. E. Place the cross-reference form in the file correctly.	Demonstrate cross-referencing with overhead projector. Discuss the relationship of cross-referencing to finding. Provide practice exercises for cross-referencing, using the card file.	Given ten pieces of material, code for cross-referencing; prepare and file cross-reference forms. (Time limit: 15 - 20 minutes; Accuracy: 100%)

Competency	Content Outline	Activity Experience	Evaluation
Process materials for filing such as legal, personnel and purchasing documents.	III. Processing Materials for Filing A. Become familiar with the areas of subject filing used within the organization B. Sort documents and record by subject	Master basic rules for subject filing. Analyze possible subject categories for specific businesses. Assign each student a different business and have him/her set up a subject file for that business. Each student will defend orally his/her subject file.	Given 50 legal, personnel and purchasing documents, sort the documents into the three categories and arrange each category in alphabetical order. (Time limit: 30 - 35 minutes; Accuracy: 100%)

Competency	Content Outline	Activity Experience	Evaluation
File materials such as legal, personnel and purchasing documents.	IV. Filing Materials A. Locate the appropriate subject file/s. B. Insert material into the folder in correct order.	Using the subject file prepared in Competency III, have the student file, by subject, the materials provided for that organization. Each student will give an oral report, defending his/her choice of category filing for each item filed.	After the 30 documents are sorted into legal, personnel and purchasing categories, locate the appropriate folders and file the documents correctly. (Time limit: 10 - 15 minutes; Accuracy: 100%)

10

BUS 112

446

447

Competency

Content Outline

Activity Experience

Evaluation

Arrange accounting ledger cards for filing or further processing.

V. Processing and Filing Ledger Cards

- A. Separate ledger cards into processed and unprocessed stacks
- B. Sort processed ledger cards according to the designated filing method
- C. Sort unprocessed ledger cards into usable order

Provide a prepared set of ledger cards for each student. Some cards should not be up-to-date.

Provide a list of day-by-day transactions to bring the cards up to date.

Have students sort their cards into processed and unprocessed stacks.

Demonstrate appropriate procedure for updating cards (overhead projector).

Have students update unprocessed cards.

Have students refile newly-processed cards.

Given 50 accounting ledger cards, separate the cards into processed and unprocessed groups. Arrange the processed cards in filing order. Arrange the unprocessed cards into usable order for further processing, process and refile.

(Time limit: 40 - 45 minutes;
Accuracy: 100%)

Competency	Content Outline	Activity Experience	Evaluation
	VI. Central Index Files		
Update the central index files.	A. Correct addresses and name changes B. Subdivide file guides to facilitate retrieval C. Verify the existing filing order D. Delete obsolete index cards	Have each student use his/her card file with alphabetic guides. Provide each student with a list of proposed name or address changes and discards. Each student will pull out obsolete cards. Each student will mark name and address changes on the necessary cards. Discuss changes made. Each changed card will be refiled.	Using the index card file and a prepared list of 20 proposed changes, update the file by correcting names and addresses, subdividing guides, deleting obsolete cards and verifying the existing filing order. (Time limit: 30 - 35 minutes; Accuracy: 100%)

Competency

Content Outline

Activity Experience

Evaluation

VII. Tickler File

Maintain a tickler file.

- A. Set up a tickler file
- B. File chronologically
- C. Review the file periodically

Provide each student with a tickler file box and month and day guides.

Have each student set up a tickler file correctly.

Provide each student with a prepared set of invoices dated for future payment.

Have each student file the invoices by due date.

Check the results.

Given 20 invoices which are to be paid during a discount period, set up a tickler file and file each invoice behind the appropriate date.

(Time limit: 15 - 20 minutes;
Accuracy: 100%)

13

BUS 112

Competency	Content Outline	Activity Experience	Evaluation
	VIII. Requests for Records or Files		
Process requests for records or files.	A. Receive completed requisition forms B. Prepare out cards/guides C. Locate the material in the files D. Remove the material from the files E. Insert the out card/guide to replace material F. Deliver the requested material G. File the requisition form in a tickler file	Teach how to complete file requisition forms (demonstration). Teach how to make out cards/guides. Discuss the importance of substituting out guides for removed materials. Supply each student with a set of completed requisition forms. Have each student prepare an out guide for each requisitioned item. Have each student remove from his/her subject file the requisitioned items. Check the accuracy of each student's removed items. Have each student file the requisition forms in the tickler files.	Given 15 completed requisitions, prepare out cards/guides, retrieve requested documents and file requisition forms. Deliver the requested materials. (Time limit: 20-25 minutes - Accuracy: 100%)

Competency

Content Outline

Activity Experience

Evaluation

Update files.

IX. Updating Files

- A. Correct addresses and name changes
- B. Subdivide overloaded folders
- C. Set up individual folders from the miscellaneous folders
- D. Verify the existing filing order

Each student will work with his/her subject file.

Provide a list of name and address changes for each student.

Have each student make the listed corrections.

Have each student remove from the miscellaneous folder correspondence in excess of five like items and prepare new subject folders.

Each student will file the new folders and verify correct filing order.

Given a list of 20 changes to be made in the filing system, correct names and addresses, subdivide existing folders, set up new folders and verify existing filing order.

(Time limit: 30 - 35 minutes;
Accuracy: 100%)

15

BUS 112

Competency	Content Outline	Activity Experience	Evaluation
Transfer outdated materials to inactive files.	X. Inactive Files A. Determine outdated material B. Remove from active files all outdated material C. Arrange outdated material in inactive files	Use the subject file for this competency. Discuss various methods used for determining which materials have become outdated. Discuss records retention media. Have each student go through the subject files and determine which items are outdated. The student will remove all outdated material from the subject files. Have each student make a new guide entitled "Inactive File" to be placed in the back of the subject files. The student will arrange the outdated material correctly and place it in the inactive file.	Given a list of five specific folders, remove all outdated material. Prepare inactive folders and place outdated material into the inactive file. (Time limit: 10 - 15 minutes; Accuracy: 100%)

Competency

Content Outline

Activity Experience

Evaluation

XI. Obsolete Materials

Dispose of obsolete materials.

- A. Determine which materials are obsolete
- B. Remove obsolete materials from the files
- C. Label obsolete materials for appropriate disposal

Discuss types of materials which become obsolete and should not be retained.

Have each student remove from the inactive section of the subject file all material categorized as obsolete.

Have each student prepare a folder entitled "Obsolete."

Check the contents of each obsolete folder for accuracy.

Given five folders used in Competency X, analyze the future need for each document. Remove obsolete materials and label for disposal (confidential/nonconfidential).

(Time limit: 20 - 25 minutes;
Accuracy: 100%)

Competency	Content Outline	Activity Experience	Evaluation
	XI'. Revising Filing Systems		
Revise filing systems.	A. Determine needed supplies and materials B. Procure needed supplies and materials C. Implement the new filing system	By use of the opaque projector, demonstrate and explain the existing filing systems. Invite a company representative to demonstrate and explain color code filing. Master filing rules for geographic and numeric filing. Use the 3 x 5 card file for this competency. Have each student set up geographic guides for the card files. Have each student refile the cards geographically and list on an answer sheet. Check the accuracy of the geographic filing for each student. Have each student set up numeric guides for numeric filing. Have each student refile the cards numerically and record by code number on an answer sheet. Check the numeric answer sheets for accuracy.	Given 50 index cards containing company names, addresses and products (prearranged in alphabetical order by company name), rearrange the cards in geographic order; prepare appropriate divider tabs and file cards correctly. Revise the file tabs for subject filing by product and refile the cards. (Geographic time limit: 30 - 35 minutes; Accuracy: 100%) (Numeric time limit: 10 - 15 minutes; Accuracy: 100%)

Competency	Content Outline	Activity Experience	Evaluation
	XIII. Filing Equipment and Supplies		
Order and use filing equipment and supplies.	A. Determine needed equipment and supplies B. Procedure for ordering equipment and supplies	Invite an office supply source representative to demonstrate and explain the use of filing supplies and materials. Assign each student several filing items to inventory for possible purchase or replacement. Compile the inventory jointly. Compile the list of needed filing supplies and materials. Provide price lists from various office supply stores. Have the students determine the best source for each item to be ordered. Have the students fill out purchase requisition forms for the selected sources. Include catalogue number, description, unit price, total prices and tax. Have the students replenish the supply with items in storage at your school. Assign student demonstration of the correct use of specific filing materials.	Given a list of filing equipment and supplies, inventory and determine replacement needs. Complete a requisition form and mail/deliver to the source of supply. Receive supplies or initiate follow-up. Place new equipment and supplies in correct storage locations. Demonstrate or explain appropriate use for each piece of equipment or supply. (Time limit: 25 - 30 minutes; Accuracy: 100%)

Competency	Content Outline	Activity Experience	Evaluation
	XIV. Microfiche		
Retrieve microfiche from the file and use microfiche equipment correctly to secure desired information.	A. Retrieve microfiche from the files B. Operate the reader C. Secure and record desired information	Arrange a field trip for a demonstration of the filing system for microfiche and the operation of the reader. (School libraries may have these.) Have the microfiche manager supervise retrieval of microfiche. Discuss the imperative importance of management by <u>one person only</u> of the microfiche files. Have the microfiche manager demonstrate the correct operation of microfiche readers. Have each student insert a microfiche card into a reader, locate specific information and remove the card correctly, with <u>supervision</u>. Each student will place the microfiche card in the <u>refile tray</u>.	Given a list of three numbers, locate the microfiche in the file. Copy the title from each microfiche. Place the designated microfiche on the reader; locate and record the three requested items of information. Return the microfiche to the <u>filing tray</u>. (Time limit: 15 - 20 minutes; Accuracy: 100%)

Competency	Content Outline	Activity Experience	Evaluation
	XV. Microfilm		
Retrieve microfilm reels from the file and operate microfilm equipment correctly to secure desired information.	A. Retrieve microfilm reels from the file B. Operate the reader C. Secure and record desired information	This competency may be combined with the microfiche field trip. Have the microfilm manager explain retrieval. Discuss the importance of <u>one person</u> having access to the <u>file</u>. Have each student locate and retrieve a specific microfilm reel from the <u>file with supervision</u>. Have the microfilm manager demonstrate correct threading and use of the microfilm reader. Have each student thread a reader, locate and record desired information and unthread the reader. Have each student return the reel to the <u>refile tray</u>.	Given the date of a specific issue of each of three journals, locate the reels in the microfilm file; record the volume and numbers included in that reel. Place a designated reel on the reader and secure and record the three requested items of information. Return the reel to the <u>filing tray</u>. (Time limit: 15 - 20 minutes; Accuracy: 100%)

BIBLIOGRAPHY

1. Books

- Bassett, Ernest D. and David G. Goodman. Business Filing and Records Control. Cincinnati: South-Western Publishing Co., Current Edition.
- Johnson, Mina M. and Norman F. Kallaus. Records Management: A Collegiate Course in Filing Systems and Procedures. Cincinnati: South-Western Publishing Co., Current Edition.
- Kahn, Gilbert and others. Filing Systems and Records Management. New York: McGraw-Hill Book Company, Gregg Division, Current Edition.
- Maedke, W. O. and others. Information and Records Management. Riverside, New Jersey: Glencoe Press, Macmillan Publishing Company, Incorporated, Current Edition.
- Place, Irene and Estelle L. Popham. Filing and Records Management. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.
- Tavernier, G. Basic Office Systems and Records. New York: Beekman Publishers, Incorporated, Current Edition.
- Weeks, Bertha M. Filing and Records Management. New York: Ronald Press Company, Current Edition.

2. Chapters and Units in Books

Related Books

- Agnew, Peter L. and others. Secretarial Office Practice. 7th ed. Cincinnati: South-Western Publishing Company, 1966. (Unit 9: "Business Filing and Records Control.")
- Agnew, Peter L. and others. Office Practice. 4th ed. Cincinnati: South-Western Publishing Company. (Unit 9: "Business Filing and Records Control.")
- Archer, Fred C. and others. General Office Practice. 2d ed. New York: McGraw-Hill Book Company, 1963.
Chapter 24: "Alphabetic Filing by Name of Individual," pp. 320-329.
Chapter 25: "Alphabetic Filing by Name of Firm," pp. 330-339.
Chapter 26: "Alphabetic Filing - Special Rules," pp. 340-352.
Chapter 27: "Other Filing Systems," pp. 353-367.
Chapter 28: "Filing Procedures and Equipment," pp. 368-381.
- Archer, Fred C. and others. General Office Procedures. 4th ed. New York: Gregg and Community College Division/McGraw-Hill Book Company, 1975.

Baron, Harold and Solomon C. Steinfeld. Clerical Record Keeping. Cincinnati: South-Western Publishing Company, 1965, pp. 20-30.

Dallas, Richard J. and James M. Thompson. Clerical and Secretarial Systems for the Office. Englewood Cliffs, NJ: Prentice-Hall, Inc., 1975.

Chapter 4: "Records Management," pp. 75-81.

Chapter 5: "Records as Reminders," pp. 82-93.

Chapter 6: "Records Equipment and Supplies," pp. 94-101.

Chapter 7: "Filing Systems," pp. 105-138.

Chapter 8: "Filing Procedures and Practices," pp. 139-150.

Friedman, Sherwood and Jack Grossman. Modern Clerical Practice.

3d ed. New York: Pittman Publishing Company, 1968.

Chapter 1: "Filing of Personal Names," pp. 1-22.

Chapter 6: "Filing of Business Names," pp. 128-157.

Chapter 11: "How to File," pp. 266-292.

Fries, Albert C. and others. Applied Secretarial Practice. 6th ed.

New York: Gregg Division, McGraw-Hill Book Company, 1968.

Chapter 16: "Alphabetic Filing Rules and Procedures," pp. 390-425.

Chapter 17: "Other Filing Systems, Equipment and Supplies," pp. 428-459.

Fries, Albert C. and others. Applied Secretarial Procedures. 7th ed.

New York: Gregg and Community College Division, McGraw-Hill Book Company, 1974. (Unit 7: "Filing," Unit 16: "Records Management Systems and Equipment.")

Gold, Faye and Raymond J. Grandfield. Business and Office Careers.

New York: Fairchild Publications, Inc., 1975. (Part III: "Filing," pp. 114-128.)

Gregg, John Robert and others. Applied Secretarial Practice. 6th ed.

New York: Gregg Division, McGraw-Hill Book Company, 1968.

(Unit 16: "Alphabetic Filing: Rules and Procedures," and Unit

17: "Other Filing Systems, Equipment and Supplies," pp. 390-459.)

Guthrie, Mearl R. Alphabetic Indexing. Cincinnati: South-Western Publishing Company, Current Edition. (Workbook available also.)

Huffman, Harry and others. General Recordkeeping. 7th ed. New York:

Gregg Division, McGraw-Hill Book Company, 1976. (Chapter 13: "Filing Records.")

Kestenbaum, A. Jack. Clerical Techniques for a Business Career.

Boston: Allyn and Bacon, Inc., 1975. (Chapter 2: "Filing.")

Meehan, James R. and others. Secretarial Office Procedures. 8th ed.

Cincinnati: South-Western Publishing Company, 1972. (Unit 11: "Business Filing," and Unit 12: "Records Management," pp. 367-472.)

Meehan, James R. and others. Clerical Office Procedures. 5th ed. Cincinnati: South-Western Publishing Company, 1973. (Unit 6: "Business Filing," pp. 182-217.)

Miller, Doris and others. Complete Secretary's Handbook. Englewood Cliffs, New Jersey: Prentice Hall, Inc., pp 33-52.

Moon, Harry R. Office Procedures. Bronx, New York: Milady Publishing Company, 1973. (Chapter 10, pp. 117-132.)

Sherster, Joyce. File Clerk Resource Materials. New York: Gregg Division, McGraw-Hill Book Company, 1973.

Shilt, Bernard A. and others. Business Principles and Management. 5th ed. Cincinnati: South-Western Publishing Company, 1967. (pp. 586-88)

Terry, George R. Office Management and Control. Homewood, Illinois: Richard D. Irwin, Inc., 1962. (Chapter 12: "Storage--Effective Filing," and Chapter 13: "Storage--Records Retention.")

Wood, Merle W. Number Filing on the Job. Cincinnati: South-Western Publishing Company, Current Edition.

3. Periodicals

American Records Management Association, 24 North Wabash Avenue, Chicago, IL 60602.

Records Management Journal. Association of Records Executives and Administrators, P. O. Box 4259, Grand Central Station, New York, NY 10017. (Quarterly, \$4 per year.)

Records Management Quarterly. American Records Management Association, 24 North Wabash Avenue, Chicago, IL 60602. (Quarterly, \$15 per year.)

4. Audiovisual Aids

a. Filmstrips

Travis, Dorot. Educational Filing Course Filmstrips (Set of 25 Filmstrips). Atlanta: Gregg-McGraw-Hill Book Company, Current Edition.

b. Transparencies

Kahn, Gilbert and Jeffrey R. Stewart, Jr. Gregg Filing Transparencies. Vol. I: Alphabetic Indexing and Vol. II: Systems and Procedures. Atlanta: Gregg Division, McGraw-Hill Book Company, Current Edition.

c. Learning Activity Packages

Duchan, Simon A. and Robert A. Schultheis. Filing Personal Names (Learning Activity Package I). Cincinnati: South-Western Publishing Company, Current Edition.

_____. Filing Business Names. (Learning Activity Package II). Cincinnati: South-Western Publishing Company, Current Edition.

_____. Special Filing Problems. (Learning Activity Package III). Cincinnati: South-Western Publishing Company, Current Edition.

5. Other Sources

a. Associations

National Records Management Council, 555 Fifth Avenue, New York, NY 10017.

b. Pamphlets

"File to Find." (Form 66.0) Garden City, New York: Oxford Filing Supply Company, Inc.

"Model 1212 Microforms Reader." (E-3033) Ann Arbor, Michigan: University Microfilms.

Reel, Rita M. File and Find. Portland, Maine: J. Weston Walch.

"33 Common Filing Questions." (Form 8.0-1) Garden City, New York: Oxford Filing Supply Company, Inc.

"Xerox Microfilm Readers from University Microfilms." (X-1267) Ann Arbor, Michigan: University Microfilms.

c. Practice Sets and Materials

Bassett, Ernest D. and David G. Goodman. Alphabetic Filing Procedures (Simulation Practice Set). Cincinnati: South-Western Publishing Company, Current Edition.

_____. Office Filing Procedures. Cincinnati: South-Western Publishing Company, Current Edition. (Accompanies Business Filing and Records Control.)

Kahn, Gilbert and Jeffrey R. Stewart. Practice Materials for Filing Systems and Records Management. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.

_____ and others. Progressive Filing Practice Set. Atlanta: Gregg Division, McGraw-Hill Book Company, Current Edition.

_____. Gregg Quick Filing Practice (Boxed Practice Set). Atlanta: Gregg Division, McGraw-Hill Book Company, Current Edition.

APPENDIX

d. Resource Books

Continold, G. Modern Filing Methods and Equipment. New York: International Publications Services, Current Edition.

Guide to Record Retention Requirements. U. S. General Services Administration, U.S. Government Printing Office, Washington, DC, 20402. (Annual)

Kahn, Gilbert and others. Progressive Filing. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.

Place, Irene and others. Fundamental Filing Practice. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Current Edition.

Records Management Handbook. Automated Education Center. Management Information Center, P. O. Box 357, Miami, FL 33145. (Looseleaf, \$39)

Tavernier, G. Basic Office Systems and Records. New York: Beckman Publishers, Current Edition.

e. Workbooks

Alphabetic/Geographic/Numeric Filing Practice Workbook. New York: Pittman Publishing Company, Current Edition.

Kahn, Gilbert and others. Workbook Exercises in Alphabetic Filing. Atlanta: Gregg Division, McGraw-Hill Book Company, Current Edition.

Kestenbaum, A. Jack. Clerical Techniques for a Business Career. Boston: Allyn and Bacon, Inc., Current Edition.

Sherster, Joyce. File Clerk Training Manual. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.

SUGGESTED PROJECT*

1. Schedule a visit to an office and do an indepth study of the filing system in that company. (You may use the company for which you work.)
2. Obtain as much information as you can about filing methods and systems used, such as:
 - a. trade names, if any
 - b. methods used (alphabetic, geographic, subject, numeric, etc.)
 - c. use of color
 - d. type of filing manual used and its contents
 - e. housing of the files--cabinets, drawers, open-shelf, etc.
 - f. manual and/or mechanical systems
 - g. comments about how the system works--strengths and weaknesses
 - h. other information that you believe will be of interest
 - i. various kinds of signaling devices used
 - j. samples (if possible)
3. After you have gathered the information, write a factual report, showing good organization of your materials. If possible, have the report typed. Also, be prepared to give the report orally. (Time limit: 5 min.)

*Suggested by Mary Helen Casey, Nash Technical Institute.